

GLASGOW CITY CENTRE

ECONOMIC HEALTH CHECK

October 2018
NO. 20

Welcome
to the twentieth
edition of

Glasgow city centre's ECONOMIC HEALTH CHECK:

Welcome to the twentieth edition of Glasgow city centre's Economic Health Check: a progress report on how the city centre is performing against a range of indicators. This edition, produced by the City Centre Regeneration Team within GCC's Development and Regeneration Services, covers the period January-June 2018 (unless otherwise stated).

What is the Health Check?

The objective of the Health Check is to track the impact of economic activity on the city centre, and to provide a baseline from which future performance can be benchmarked.

Trends

The table below provides an at-a-glance colour coded trend indicators.

Colour codes as follows:

- - Improvement
- - Relative stability
- - Decline

Crime/ASB

Crime/ASB figures
have declined overall

Footfall

Average headline/
overall footfall has
decreased

Planning & Development

City Centre retail applications
have shown an increase
compared to the previous
period

Vacant Units

Average vacancy rates have remained
stable since last edition

Tourism

Glasgow Airport Passenger levels have
shown a decrease for this reporting period

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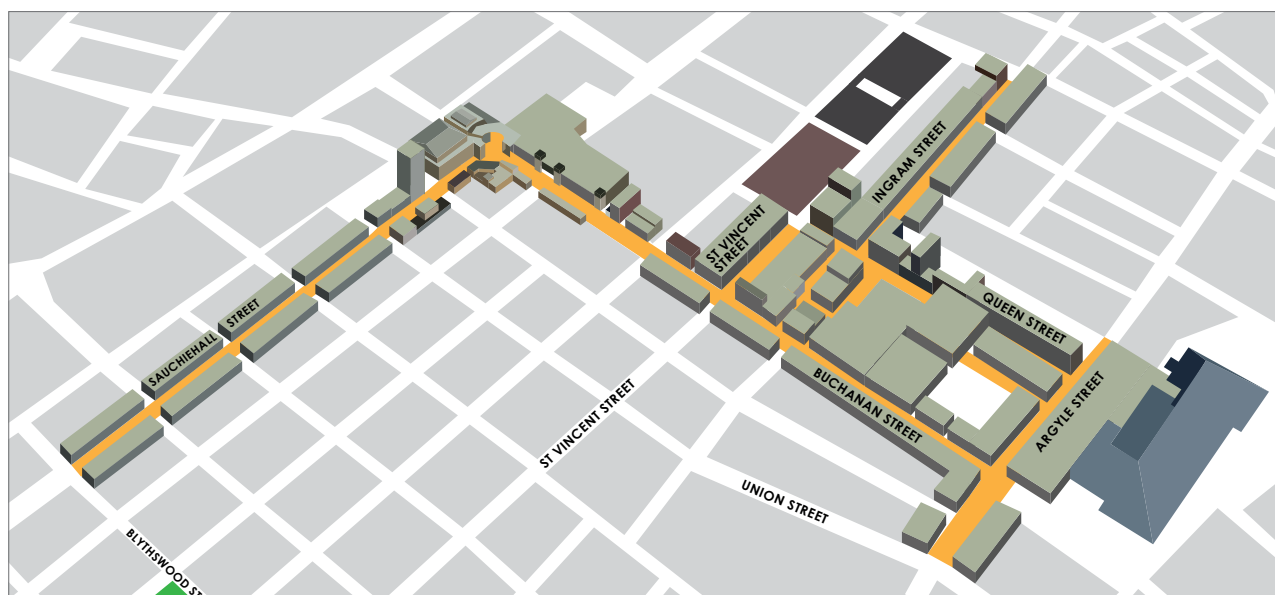
STYLE MILE: Background and Area Map



The "Style Mile" relates to the square mile in the heart of Glasgow's city centre and is the principal retail area containing many unique independent designer and flagship stores for British and international retailers. A map and retail and visitor guide can be found online at

<https://peoplemakeglasgow.com/>

The Style Mile is a public-private partnership initiative to promote, protect and enhance Glasgow's city centre retail offering.



TOP 10 BRITISH RETAIL CENTRES

Harper Dennis Hobbs¹ have ranked the top 50 British retail centres by the total retail spend attracted to each centre. The Retail Spend Potential is calculated based on the supply and demand characteristics of each centre. Glasgow is currently ranked in second place.

TOP 10 RETAIL CENTRES BY EXPERIAN REPORT

The most recent Experian report² (ranking the UK's top retail centres based on comparison spend (£m)) continues to show Glasgow in second place.

TOP 10 LOCATION CENTRES BY JAVELIN GROUP

Javelin Group is described as Europe's leading specialist retail and ecommerce consultancy and work with many of the regions largest retailers and distributors including most of the UK's top 20 retailers. Their VENUESCORE Report 2017³ evaluates locations in terms of their provision of multiple retailers. A score is attached to each operator which reflects their overall impact on shopping patterns. The resulting aggregate scores are then ranked. The top ten scores are shown below. Whilst London's West End ranks far higher than any other location (with 1,625 points), the VENUESCORE report considers it comprised of a number of separate (albeit interlinked) retail venues. As a result, Glasgow currently ranks in second place.

¹ Harper Dennis Hobbs Retail Centre Reports 2017

² <http://www.experian.co.uk/marketing-services/news-retailscape-uk-retail-centres-best-placed-to-thrive.html>

³ Javelin Group VENUESCORE 2017

TOP 10 BRITISH RETAIL CENTRES

1. **LONDON WEST END**
£9,141,226,044
2. **GLASGOW**
£4,260,877,222
3. **BIRMINGHAM**
£3,738,666,154
4. **MANCHESTER**
£3,534,636,565
5. **LEEDS**
£3,180,292,167
6. **LIVERPOOL**
£3,102,829,857
7. **NOTTINGHAM**
£3,003,776,127
8. **CARDIFF**
£2,798,170,147
9. **NEWCASTLE UPON TYNE**
£2,796,940,154
10. **EDINBURGH**
£2,346,843,910

TOP 10 BRITISH RETAIL CENTRES

VENUESCORE REPORT 2015 - 2016

	LOCATION	TYPE OF RETAIL CENTRE	COMPARISON SPEND (£M)	LIKELIHOOD TO BUY ONLINE
1.	LONDON WEST END	CITY CENTRE	£4,465	5
2.	GLASGOW CENTRAL	CITY CENTRE	£1,939	4
3.	BIRMINGHAM CENTRAL	CITY CENTRE	£1,561	2
4.	MANCHESTER CENTRAL	CITY CENTRE	£1,549	2
5.	LIVERPOOL CENTRAL	CITY CENTRE	£1,540	2
6.	LEEDS CENTRAL	CITY CENTRE	£1,447	3
7.	WESTFIELD STRATFORD	MALL	£1,371	1
8.	EDINBURGH PRINCES STREET	CITY CENTRE	£1,325	6

*1 = LOW LIKELIHOOD TO BUY ONLINE 10 = HIGH

**1 MANCHESTER
780**

**2. GLASGOW
776**

**3. LEEDS
659**

**4. BIRMINGHAM
640**

**5. LIVERPOOL
548**

**6. CARDIFF
516**

**7. BRIGHTON
503**

**8. NOTTINGHAM
500**

**9. EDINBURGH
498**

**10. NEWCASTLE UPON TYNE
450**

1. SOCIO ECONOMIC PROFILE OF THE CITY CENTRE (Ward 10)

1.1 POPULATION⁴

The estimated population of Ward 10 is 30,184.
Of this, 15,866 are males and 14,318 are females.

1.2 HOUSEHOLDS AND HOUSING⁵

In the most recent census, there were 13,052 households in Ward 10.
The average household size was 1.70

1.3 ECONOMY⁶

Employee job total is 144,000.
103,300 of these are full time and 40,700 are part time.

Table 1.1: Population by age

0-4	5-11	12-15	16-29	30-44	45-64	65-74	75+
922	738	317	16,194	6,462	3,791	942	818

Table 1.2: Households and Housing

Total	Owner occupied	Private rented	Glasgow Housing Association	Other social rented
13,833	4,948	5,200	1,032	2,653

⁴ National Records of Scotland Estimates 2015

⁵ National Records of Scotland – 2011 census

⁶ ONS 2015 Business Register and Employment Survey

Manufacturing, Construction and Utilities	4,100
Wholesale and Retail	13,000
Professional Services *	73,500
Public Sector Services **	28,900
Other Activities ***	24,500

*includes services in relation to business administration, information, communication, finance, insurance, property, professional, scientific and technical

**includes services in relation to public administration, education and health

*** includes motor trades, transport, storage, accommodation, food services, arts, entertainments and recreation

Table 1.3: Employee jobs by broad industrial group

2. FOOTFALL

2.1 Style Mile Footfall

The Style Mile footfall monitor is based on Springboard's Customer Counting and Measurement system that registers footfall at designated counters located throughout the Style Mile. These four core counters are positioned at the following locations:

Buchanan Street at Kiehl's
Argyle Street at Debenhams

Buchanan Street at Buchanan Galleries
Sauchiehall Street at Marks and Spencer

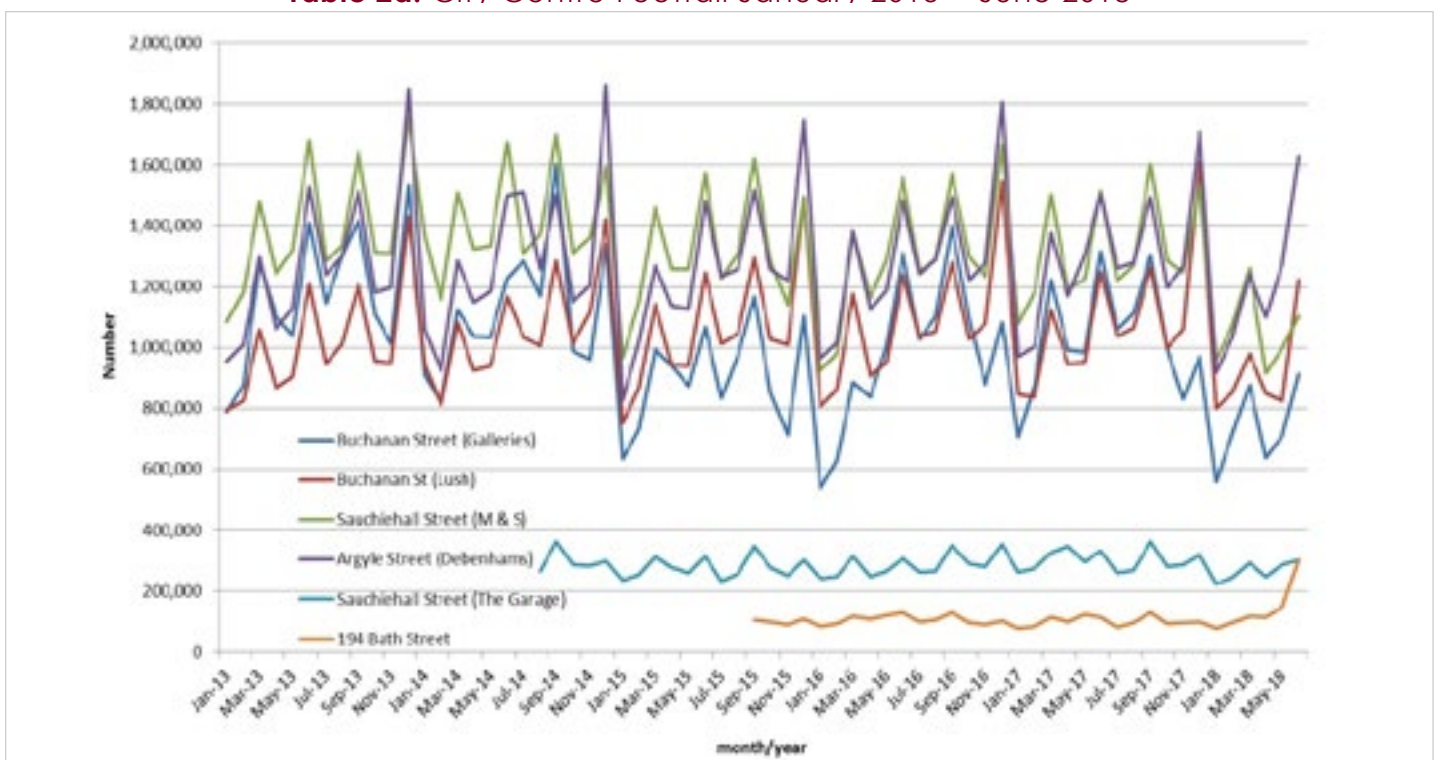
Additional counters have also been installed adjacent to the **Garage nightclub** at the **western end of Sauchiehall Street**, and at **194 Bath Street**.

Table 2a⁷ below shows data collated from these counters from January 2013 – June 2018. Springboard counters record footfall over each 24-hour period and register both day and night time economy.

Total footfall recorded across all counters for the period of January-June 2018 decreased by 12.29% when compared against the same period in 2017. However, Bath Street saw a large increase in footfall during this comparison period, recording a total increase of 40.46%.

It should be noted that whilst footfall has decreased UK wide, Glasgow has also suffered from two large fires resulting in pedestrian exclusion zones on Sauchiehall Street thus affecting footfall figures for Sauchiehall Street counters. Argyle Street footfall remains stable despite this UK drop in footfall.

Table 2a: City Centre Footfall January 2013 - June 2018



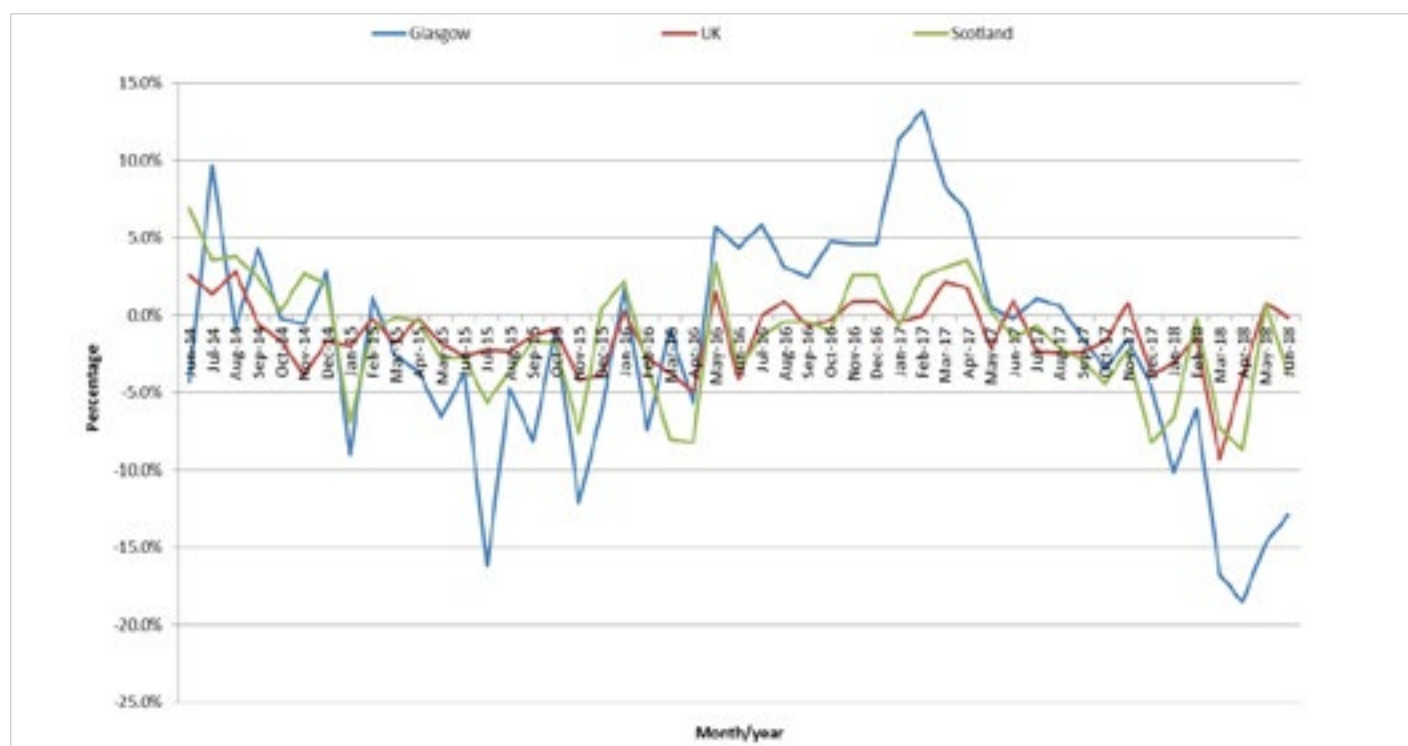
⁷ Springboard, August 2018

The British Retail Consortium (BRC) / Springboard Retail Footfall Monitor gathers data on customer activity in town and city centre locations, and in out of town shopping locations, throughout the UK using the latest generation automated technology. The Monitor records over 60 million footfall counts per week at over 600 counting locations across 227 different shopping sites in 142 towns and cities across England, Northern Ireland, Scotland and Wales. The Monitor covers the main centres in each nation/region and a representative sample of secondary and smaller town centres.

The Monitor provides the only available broad-based measures of the footfall performance of town centres and out of town shopping locations in the UK.

Table 2b⁸ illustrates the year-on-year change in Glasgow's footfall figures as compared against national comparator data drawn from the BRC/Springboard Retail Footfall Monitor from June 2014 to June 2018.

Table 2b: BRC/ Springboard Footfall Monitor - Year-On-Year % Change



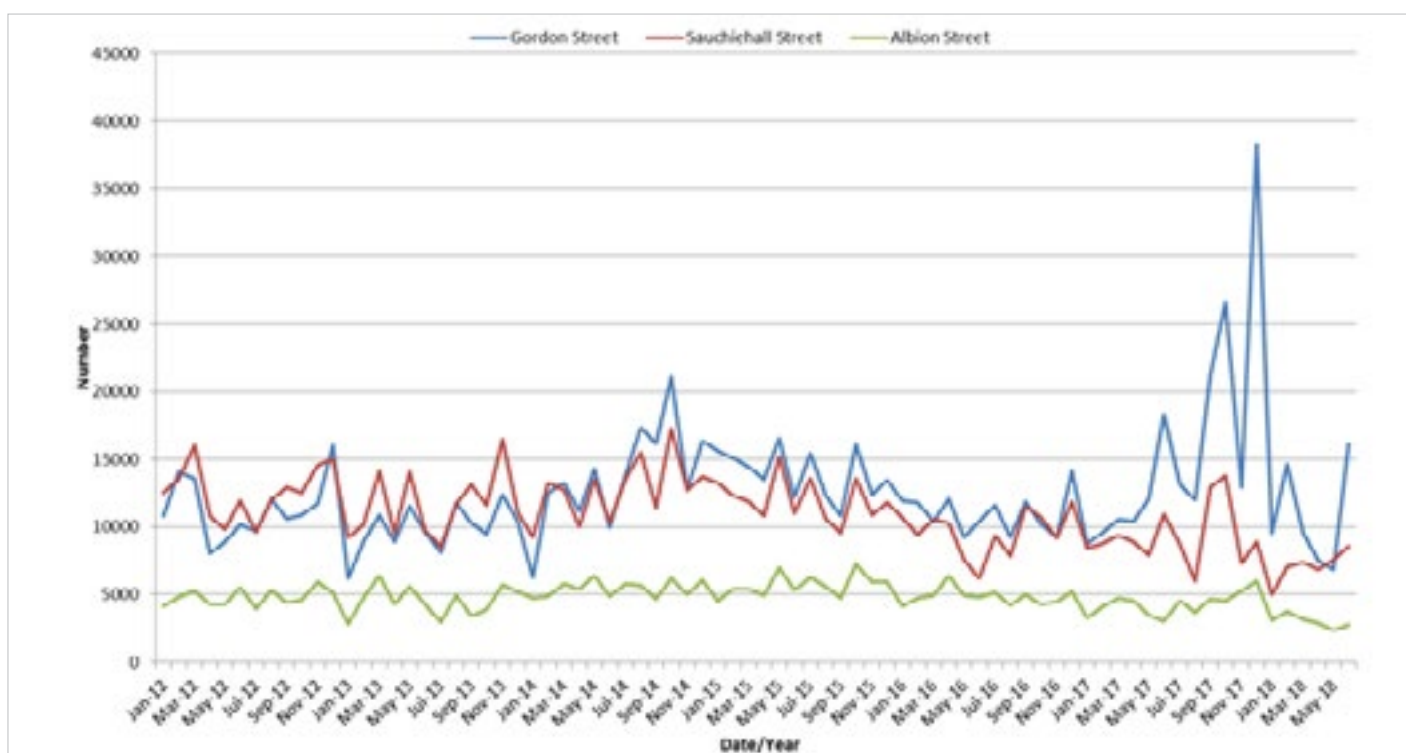
⁸ BRC/ Springboard Footfall & Vacancies Monitor, August 2018

2.2 Nitezone footfall

Table 2c⁹ Table 2c illustrates comparative Nitezone footfall figures from January 2012 – June 2018. These figures (relating to locations at Gordon Street, Sauchiehall Street, and Albion Street) are collated by taxi marshals who are present at the designated taxi pick up points between 10pm and 5am every Friday and Saturday night. They ensure the efficient, safe exit out of the city for users of the night time economy.

Average footfall figures recorded in Gordon Street and Sauchiehall Street appear to have stabilised since mid-2012. Albion Street figures have remained stable throughout. The total Nitezone footfall recorded over all three city centre precincts during the reporting period of January-June 2018 showed a change of -15.17% when compared to those recorded over the same reporting period in 2017.

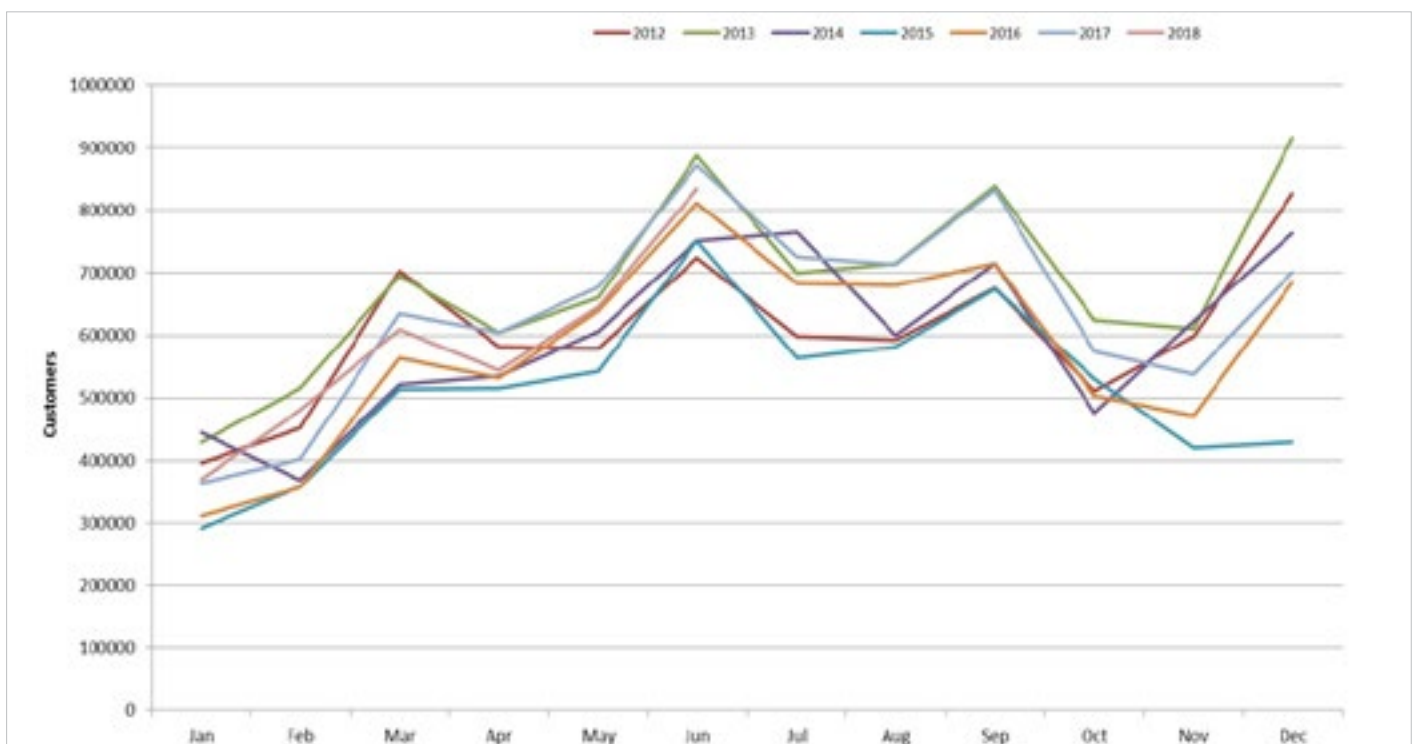
Table 2c: Nitezone Footfall



⁹ CSG, August 2018

Table 2d¹⁰ shows the footfall recorded by the core Style Mile counters during the hours of 6pm – 4am. This is the retail period usually referred to as the Night Time Economy. These figures were recorded within Glasgow Style Mile from January 2012 to June 2018.

Table 2d: Glasgow Night Economy



¹⁰ Springboard, August 2018

2.3 SPT Footfall - Subway Footfall

SPT have thirteen reporting periods in which they collate Subway footfall data based on numbers boarding (going through the barrier). These periods are based along financial accounting periods.

Table 2e¹¹ shows the footfall recorded for each reporting period from 2011/12 onwards (it should be noted that the Subway suspension period took place between reporting period 4 and reporting period 5 in 2016/17). This edition of the Healthcheck looks at data collected from reporting period 11 in 2017/18 to reporting period 3 in 2018/19. A comparison of this data with data from the same periods collected 12 months previously shows an increase of 2.25% in footfall figures.

Table 2e: St. Enoch Subway Footfall

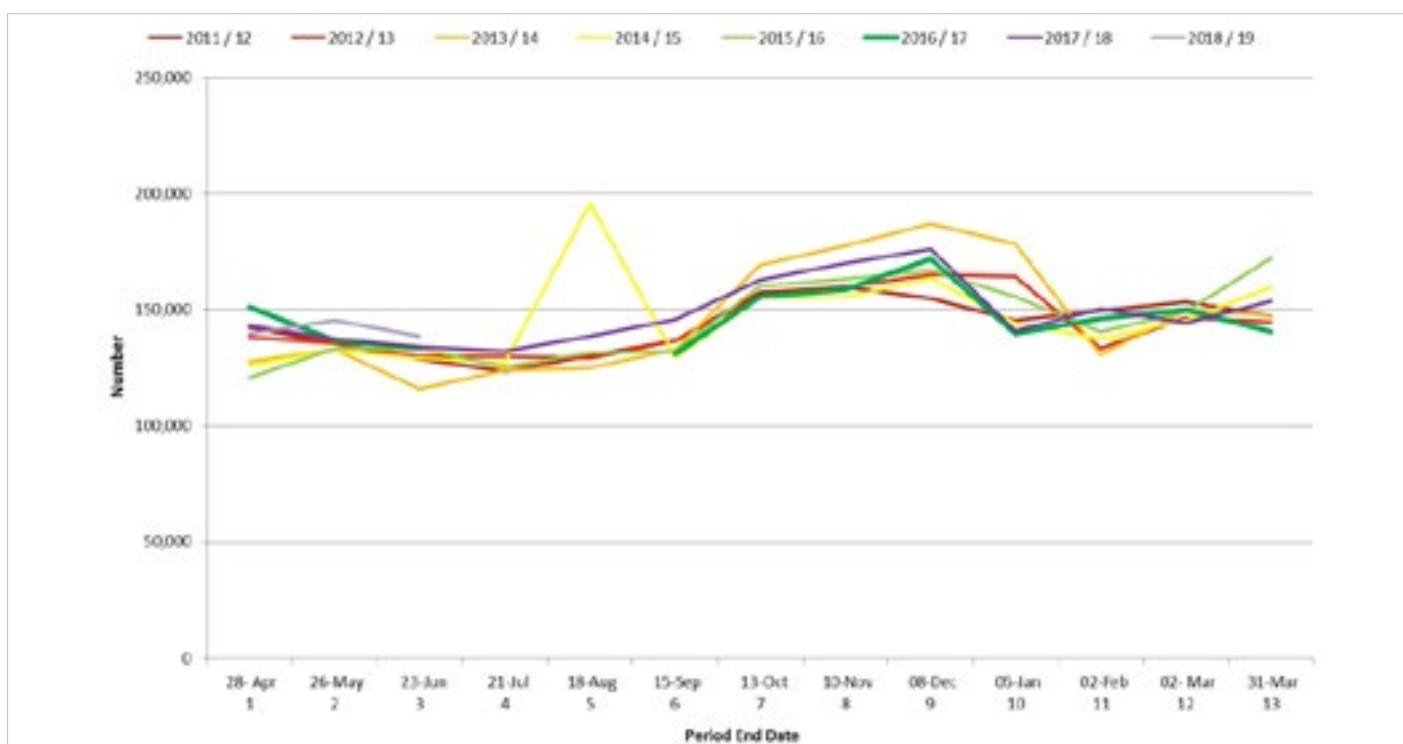
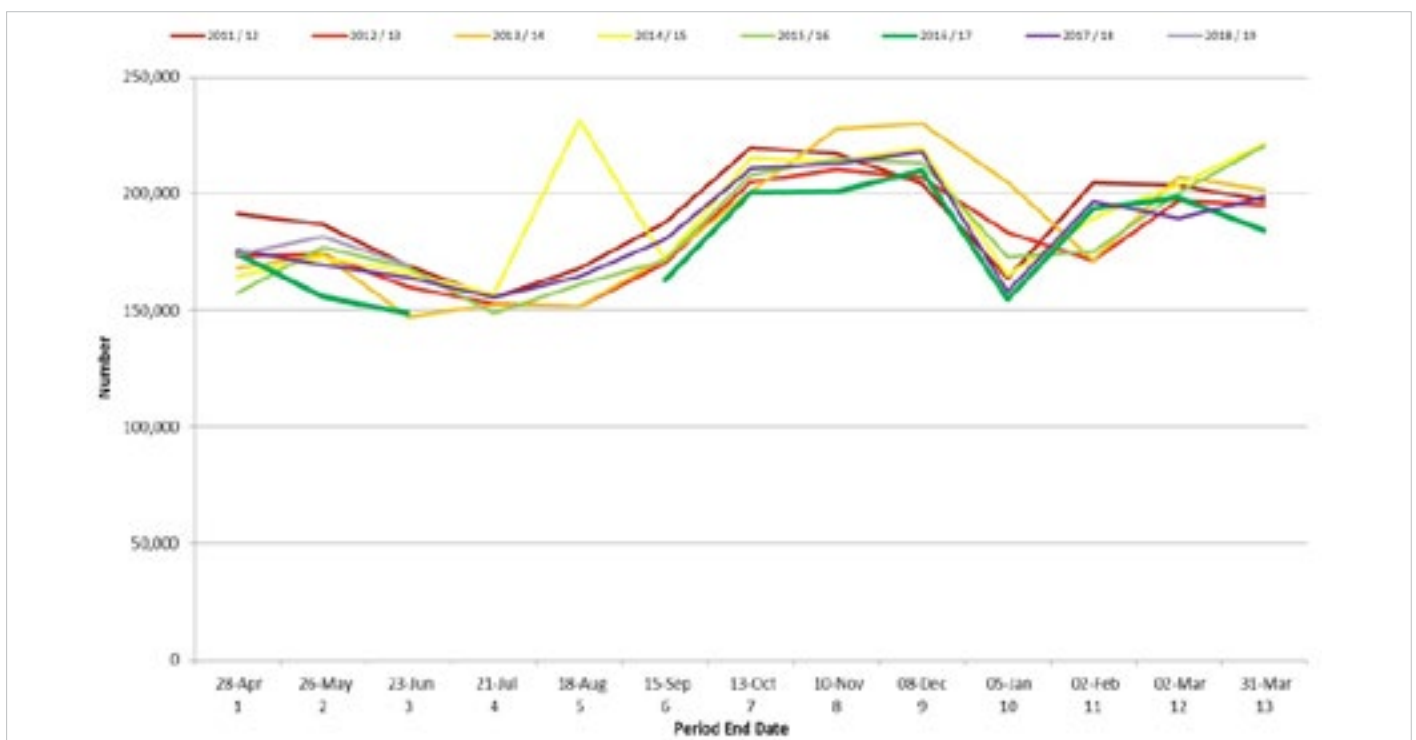


Table 2f¹² shows that Buchanan Street Subway station records a higher footfall than St Enoch Subway station. This edition of the Healthcheck looks at data collected from reporting period 11 in 2017/18 to reporting period 3 in 2018/19 (it should be noted that the Subway suspension period took place between reporting period 4 and reporting period 5 in 2016/17. A comparison of this data from the same periods collected 12 months previously shows an increase of 2.25% in footfall figures.

Table 2f: Buchanan Street Subway Footfall

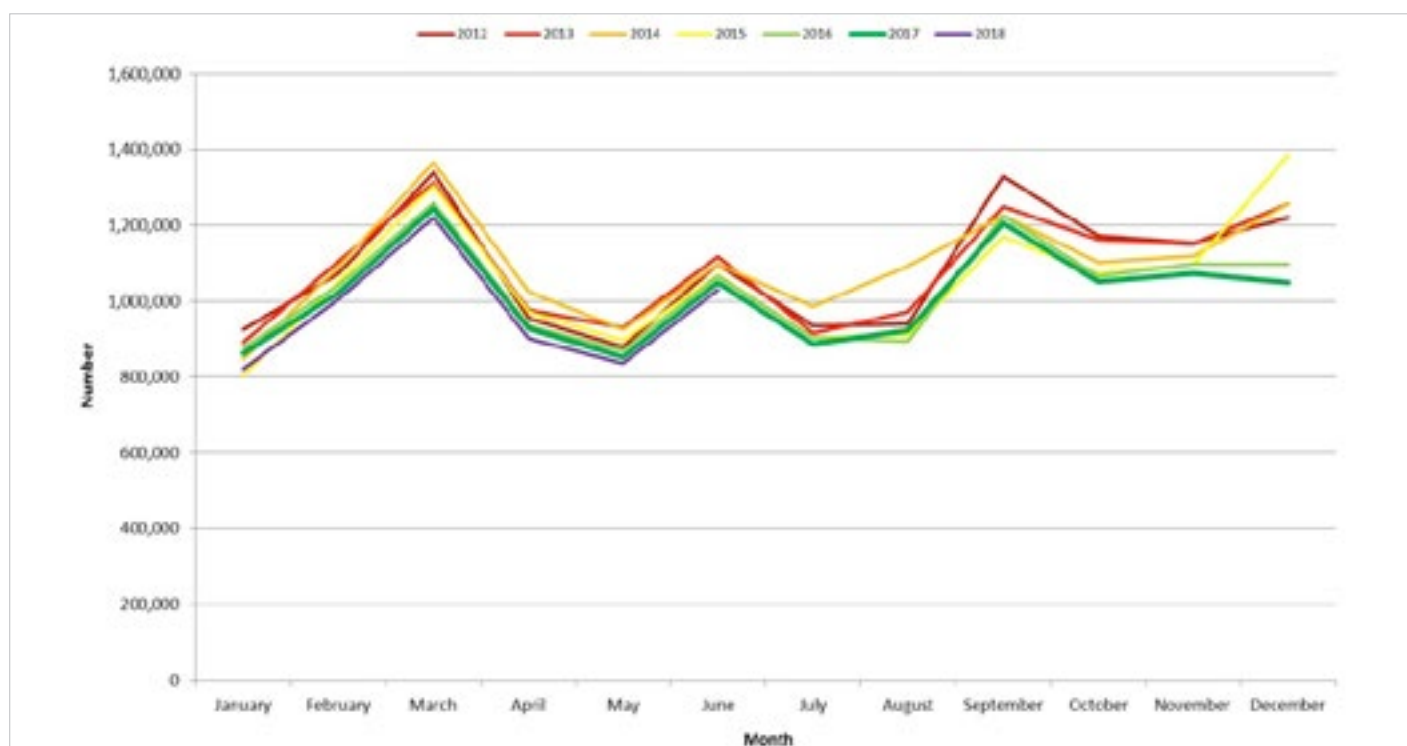


¹² Ibid

2.4 Bus Station Footfall

Table 2g¹³ illustrates the footfall at Buchanan Bus Station. Total footfall recorded at this location between January and June 2018 showed a change of -2.36% against the figures recorded over the same period in 2017.

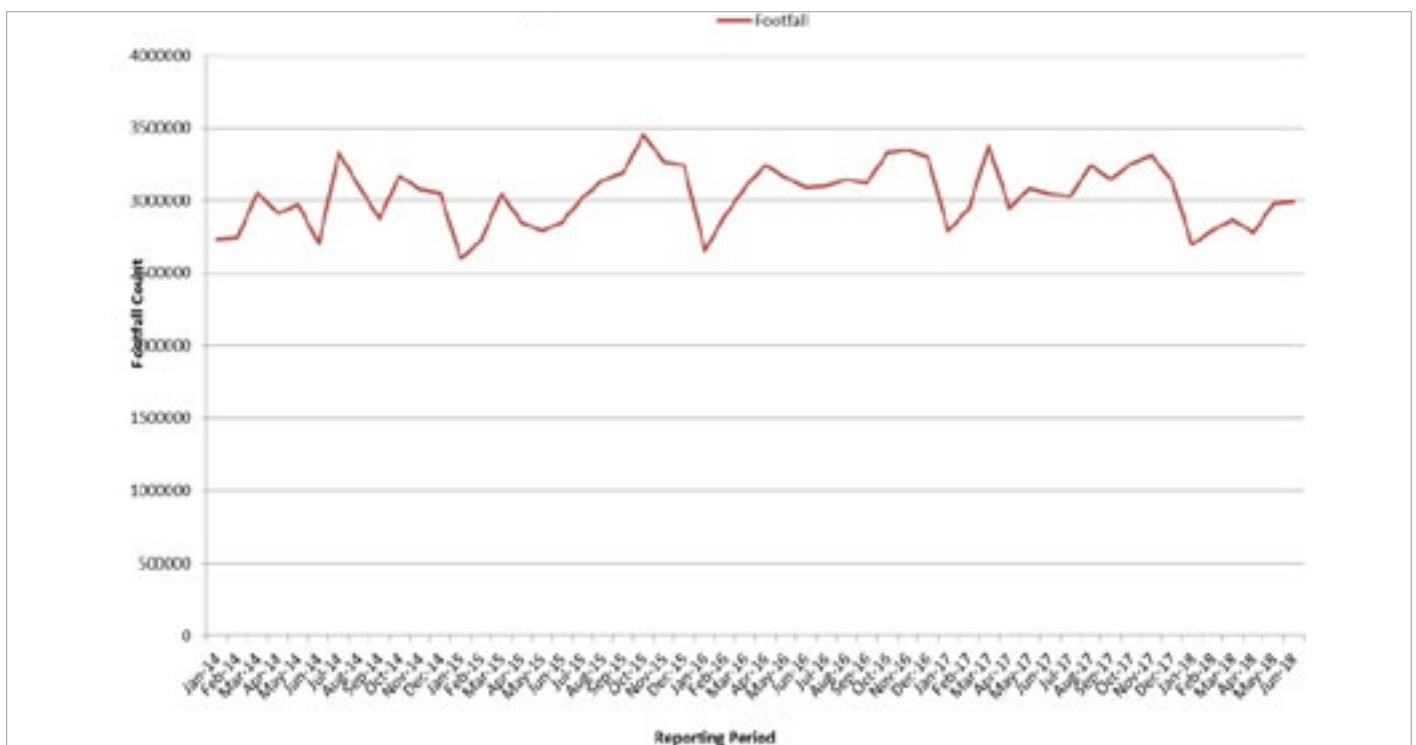
Table 2g: Buchanan Bus Station Footfall



2.5 Train Station Footfall

Table 2h¹⁴ illustrates the footfall count recorded by Network Rail at Glasgow Central Train Station. Total annual footfall figures recorded from January to June 2018 showed a decrease of 5.93% against the figures recorded during the same reporting period in 2017.

Table 2h: Glasgow Central Station - Footfall Count 2014 - 2018



¹⁴ Network rail, August 2018

4. VACANT UNITS (STYLE MILE)

Table 3a¹⁵ illustrates the city centre's ground floor vacant unit trend since March 2010. The Glasgow data is a record of the number of vacant units at street level and includes Class 1 (shops), Class 2 (financial, professional and other services – e.g. banks, Class 3 (food and drink – e.g. cafes and restaurants) and Sui Generis (not in any “use class” e.g. pub or hot food takeaways). It does not include vacant units within shopping centres. The vacancy rate is defined as the percentage of the ground floor units in the town centre that are vacant, and a vacant unit is regarded as one which is not trading at the time of the survey (whether or not it is let).

Table 3a: Style Mile: Street Level Vacant Units (%)

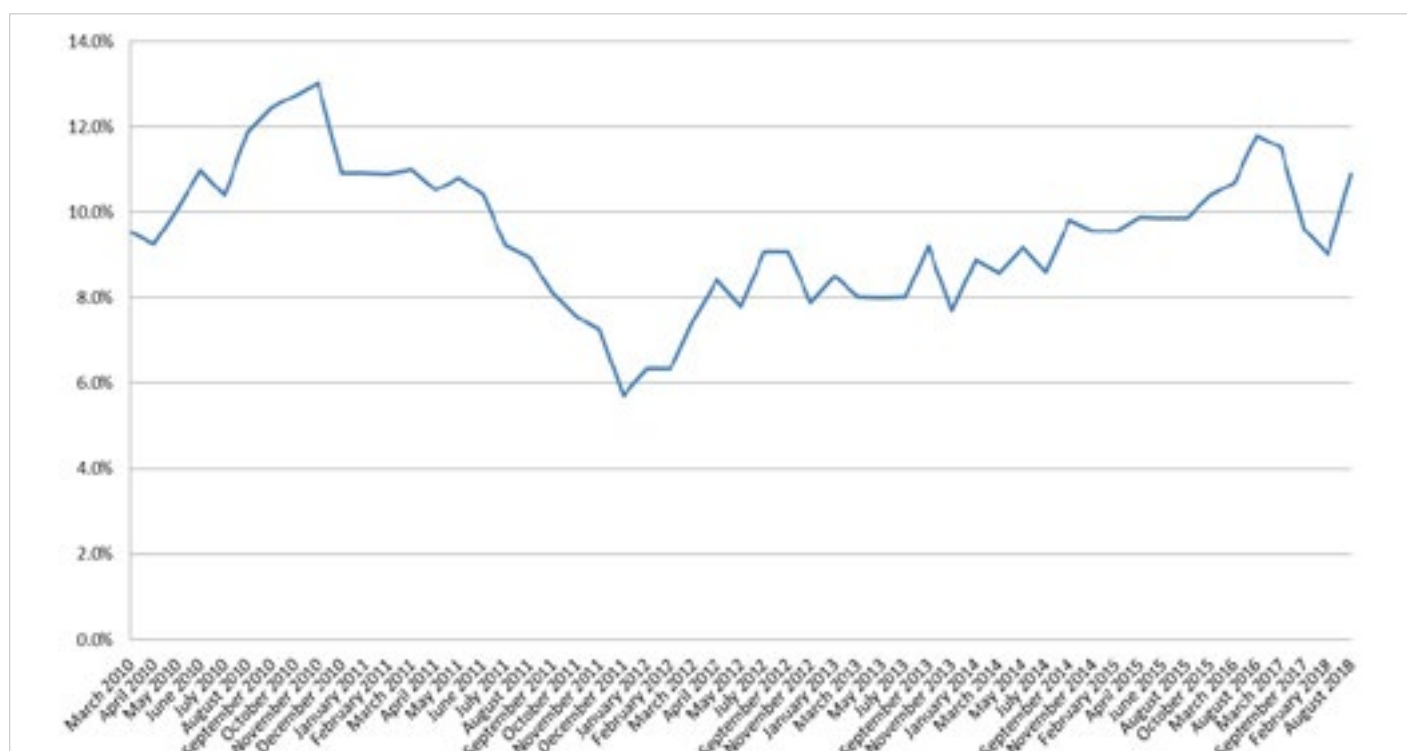
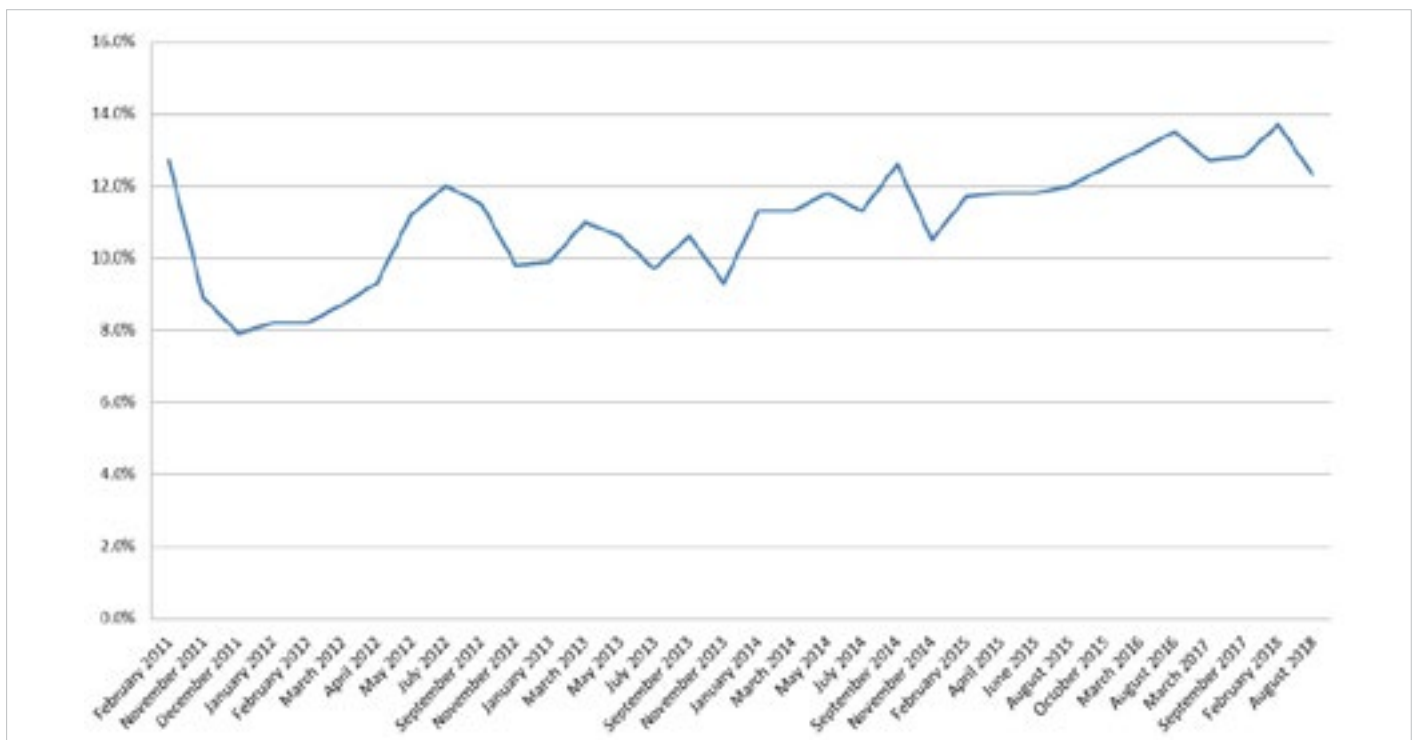


Table 3b¹⁶ shows vacancy rates for the Style Mile including shopping centres as recorded at various points from February 2011 to August 2018. As a result, these rates are greater than that of ground floor only vacancy rates recorded in the Style Mile.

Table 3b: Style Mile: All Vacant Units (%)



¹⁶ Ibid

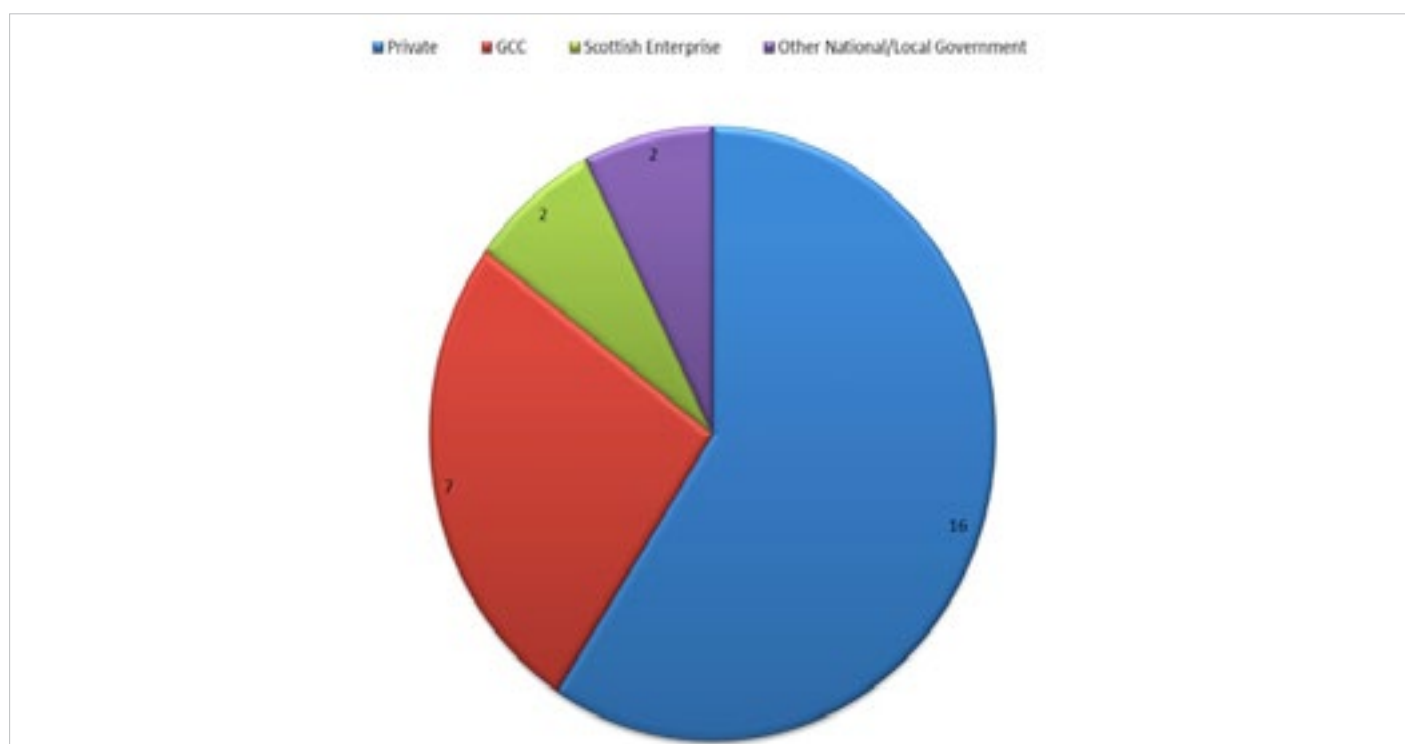
4. VACANT SITES (CITY CENTRE)

Within the city centre area bounded by the M8, High Street and the River Clyde there are 27 sites comprising approximately 19.70 hectares of vacant / derelict land.

Table 4a¹⁷ provides a breakdown of the ownership of these sites by number.

As indicated, the majority of sites are privately owned. Their potential land use is varied from residential to office, retail, civic and mixed use. The majority of sites appear to have had planning consents granted or are in the process of undertaking pre-application work. A number of sites have a temporary use, predominantly car parking, and various others have been temporarily landscaped. Development on these sites can be slow because of the nature, scale and complexity of vacant sites, as well as the impact of the global economic environment.

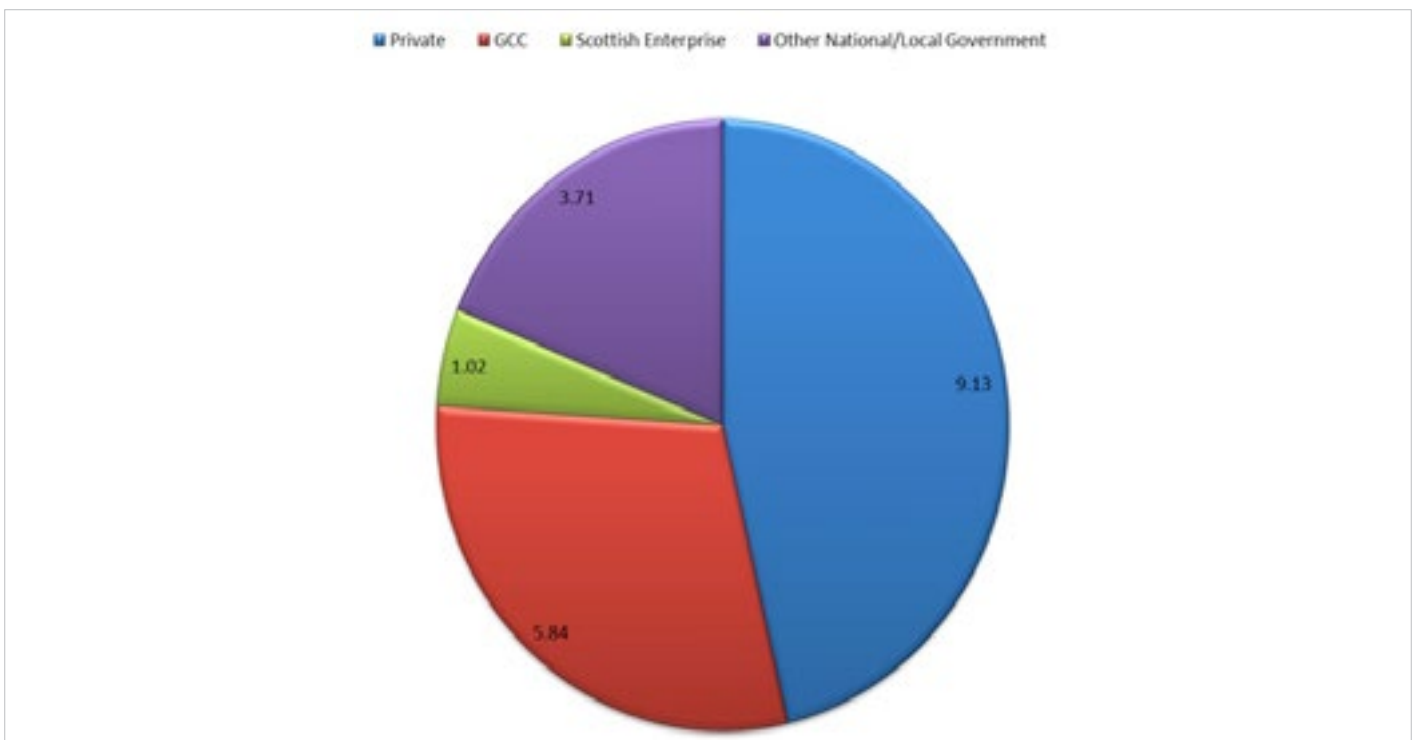
Table 4a: Number of Vacant Sites within the City Centre



¹⁷ GCC, August 2018

Table 4b¹⁸ provides a breakdown of the ownership of these sites by area.

Table 4b¹⁸: Area of Vacant Sites Within the City Centre



¹⁸ Ibid

5. UK PROPERTY MARKET TRENDS

Cushman & Wakefield is a privately held commercial real estate services firm which provides a range of services globally. Their UK Quarterly MarketBeat is a review of market trends and price movements in the UK property markets, which includes an analysis of yields and rental values for the retail, office, industrial, hotel and residential property sectors. It should be noted that these reports are prepared solely for information purposes and do not purport to be a complete description of the markets or developments contained therein. Further information can be found via <http://www.cushmanwakefield.co.uk/en-gb/research-and-insight/local-reports/>.

Table 5a¹⁹ shows the indicative prime industrial rent levels over the relevant reporting periods for Glasgow and various other UK comparator locations.

Table 5a: Prime Industrial Rents

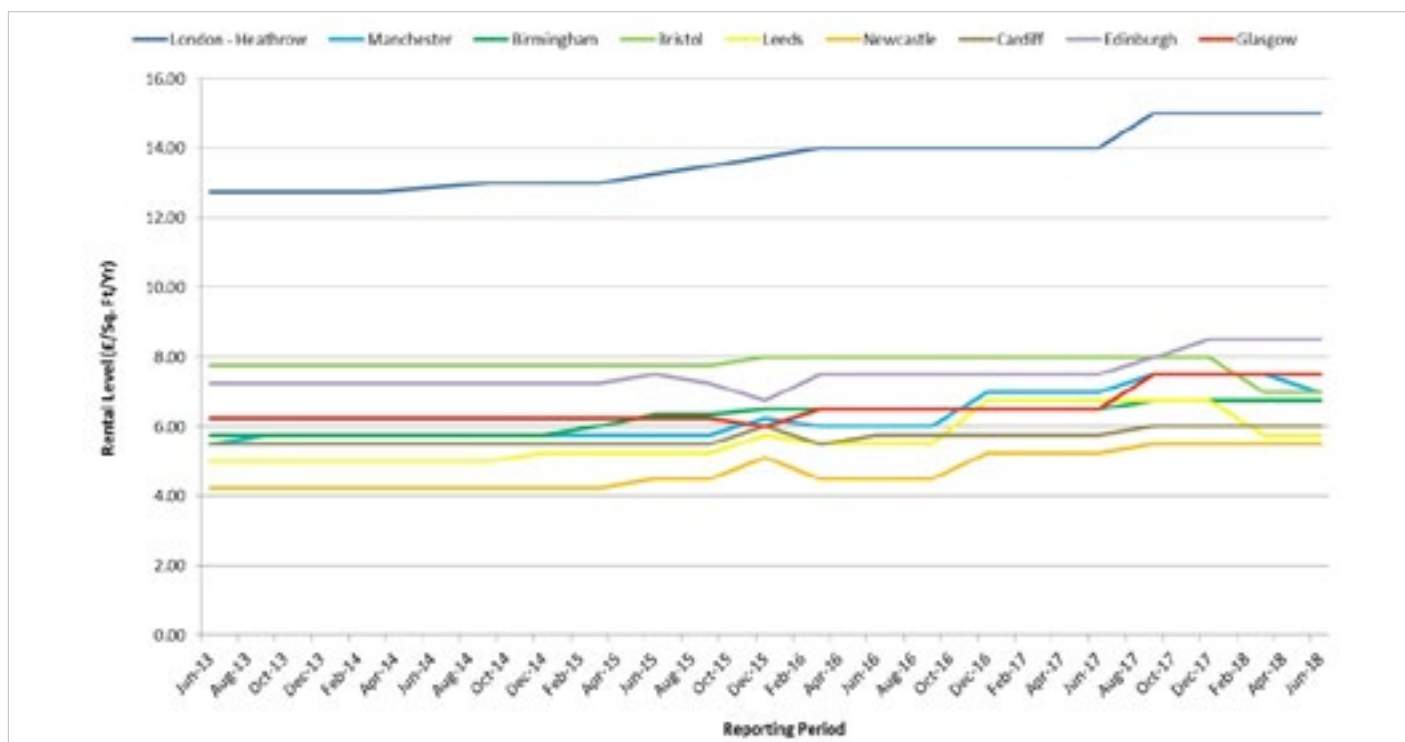
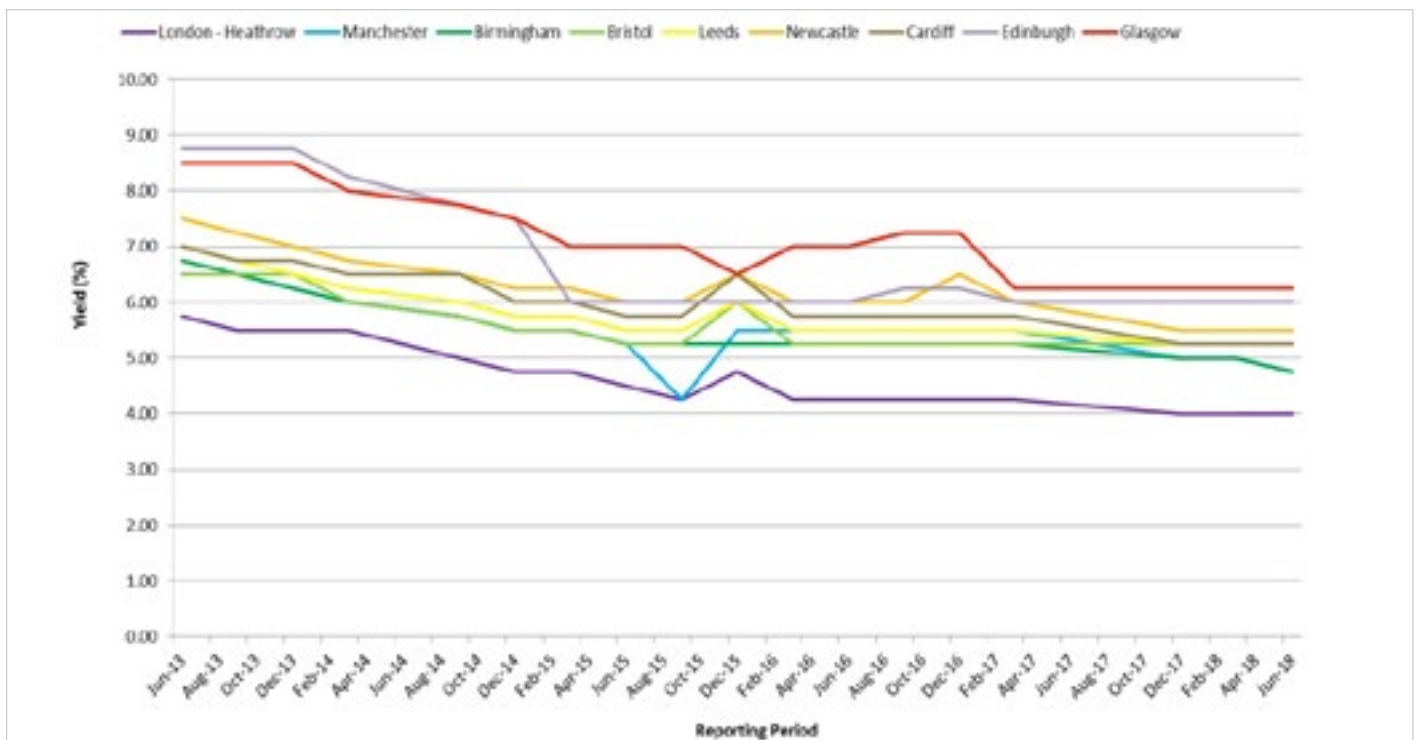


Table 5b²⁰ shows the indicative prime industrial yields over the relevant reporting periods for Glasgow and various other UK comparator locations. (Note: there is no current data for Glasgow for reporting period Jun-17)

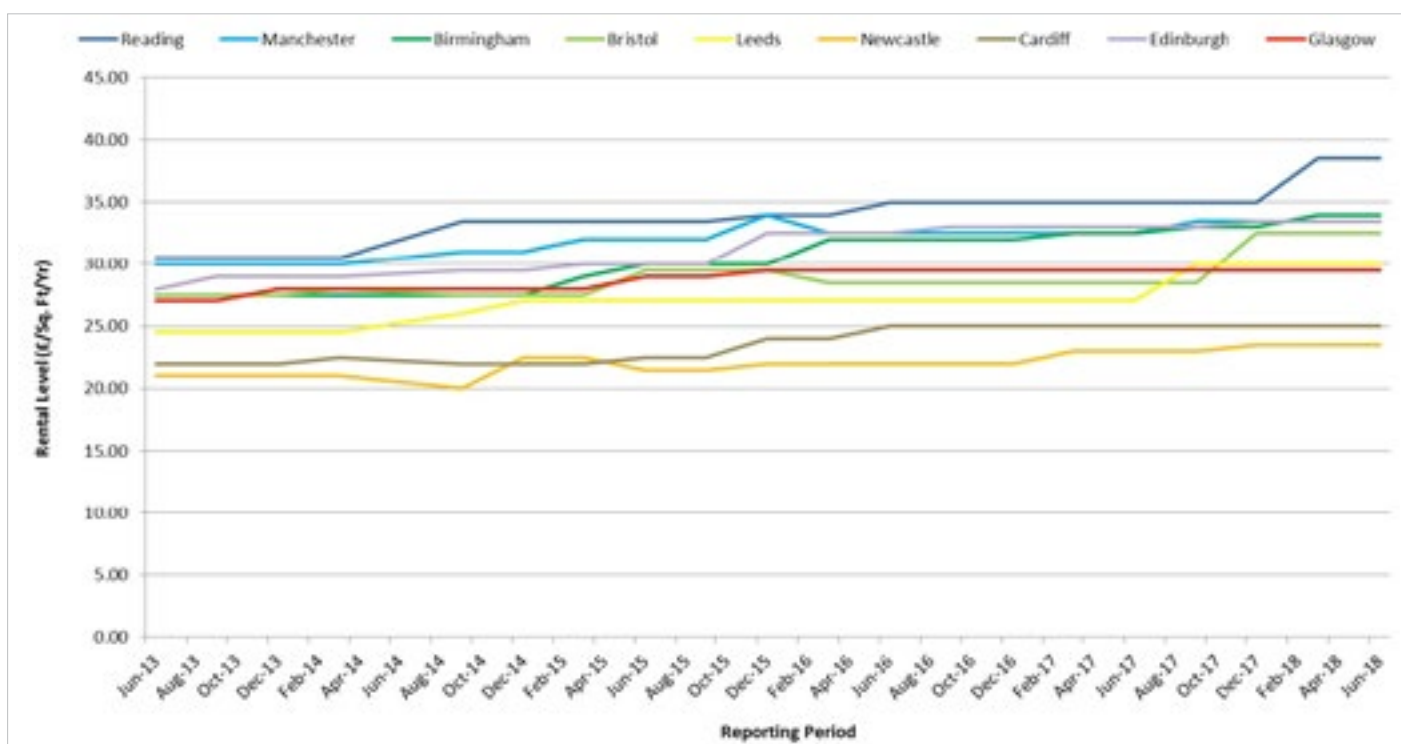
Table 5b: Prime Industrial Yields



5.2 Office

Table 5c²¹ shows the indicative prime office rental levels over the relevant reporting periods for Glasgow and various other UK comparator locations.

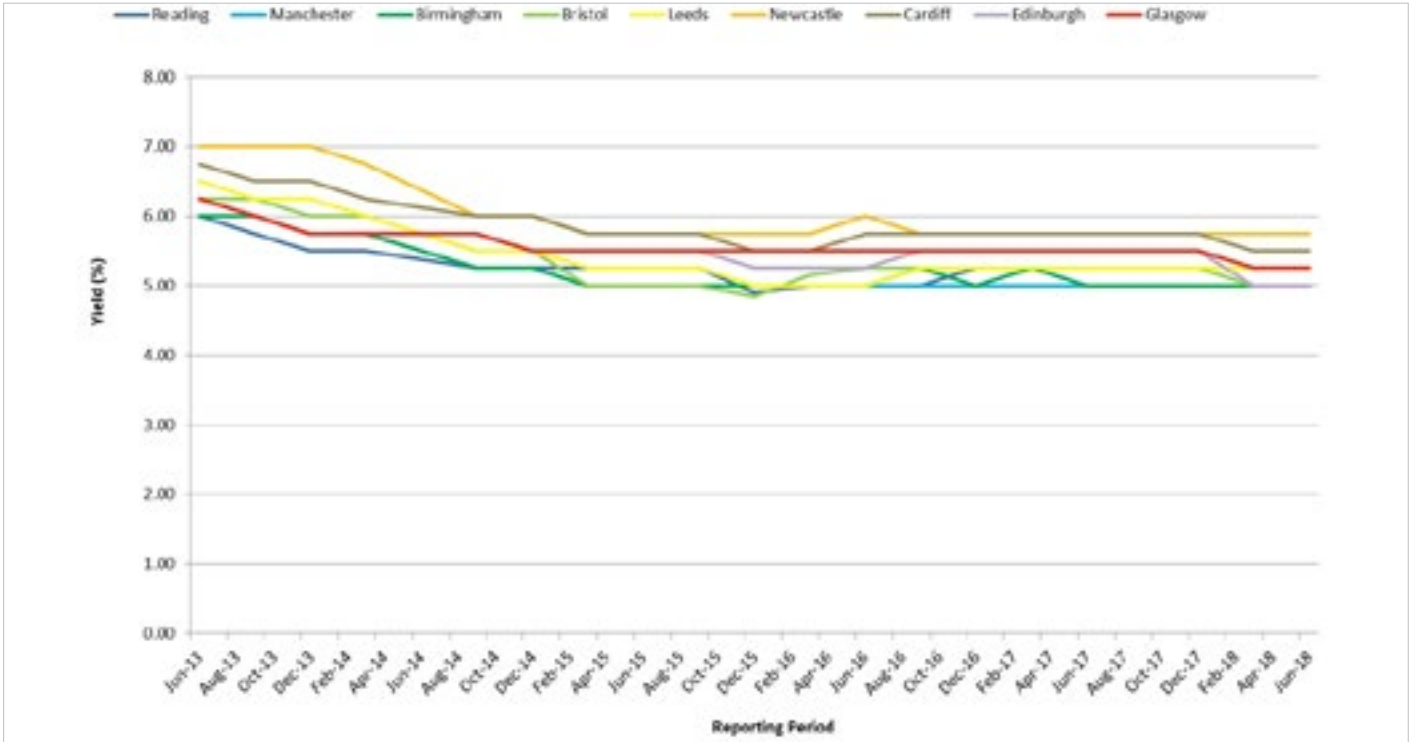
Table 5c: Prime Office Rents



²¹ Ibid

Table 5d²² shows the indicative prime office yields over the relevant reporting periods for Glasgow and various other UK comparator locations.

Table 5d: Prime Office Yield

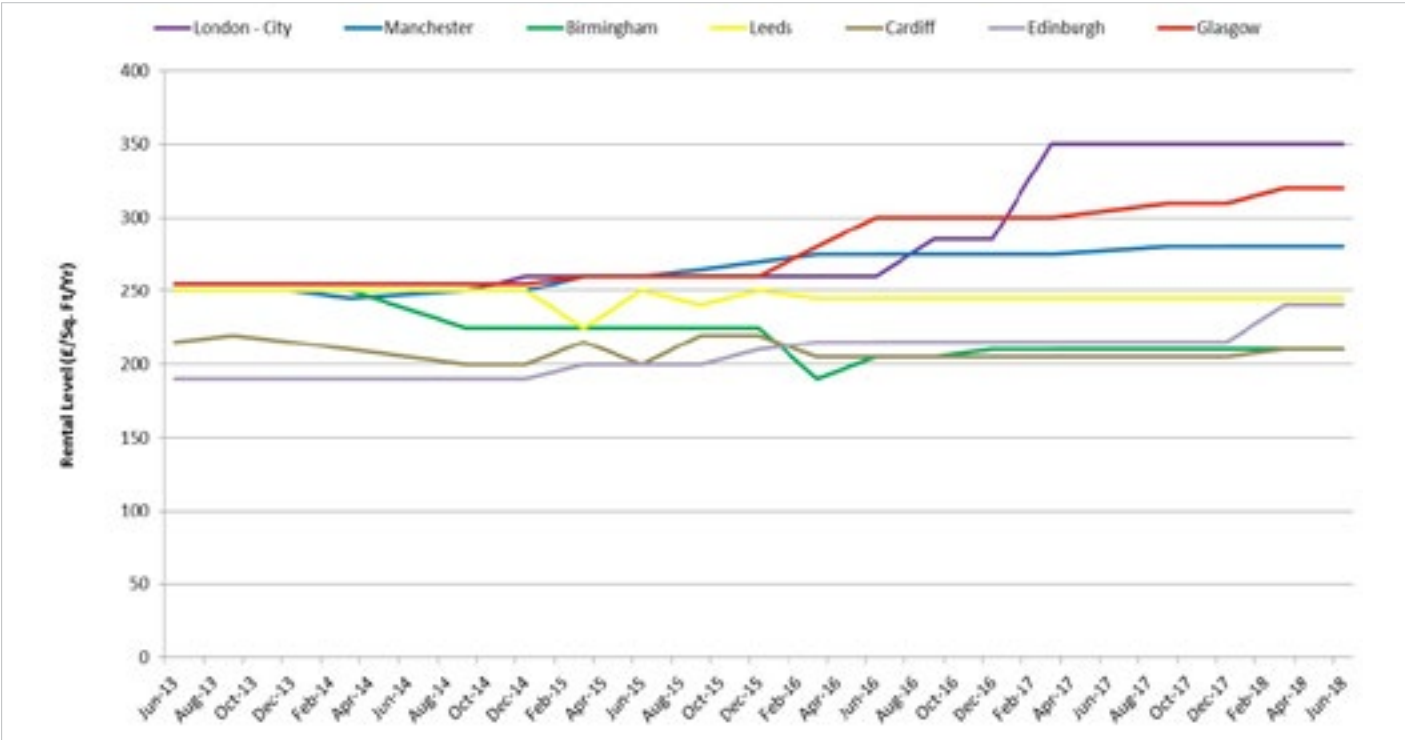


²² Ibid

5.3 Retail

Table 5e²³ shows the indicative prime retail rental levels over the relevant reporting periods for Glasgow and various other UK comparator locations. Due to the discrepancy between its high rental level figures and the other comparator locations, London (West End) is not included in this table. Please also note that zoning practices can differ between cities.

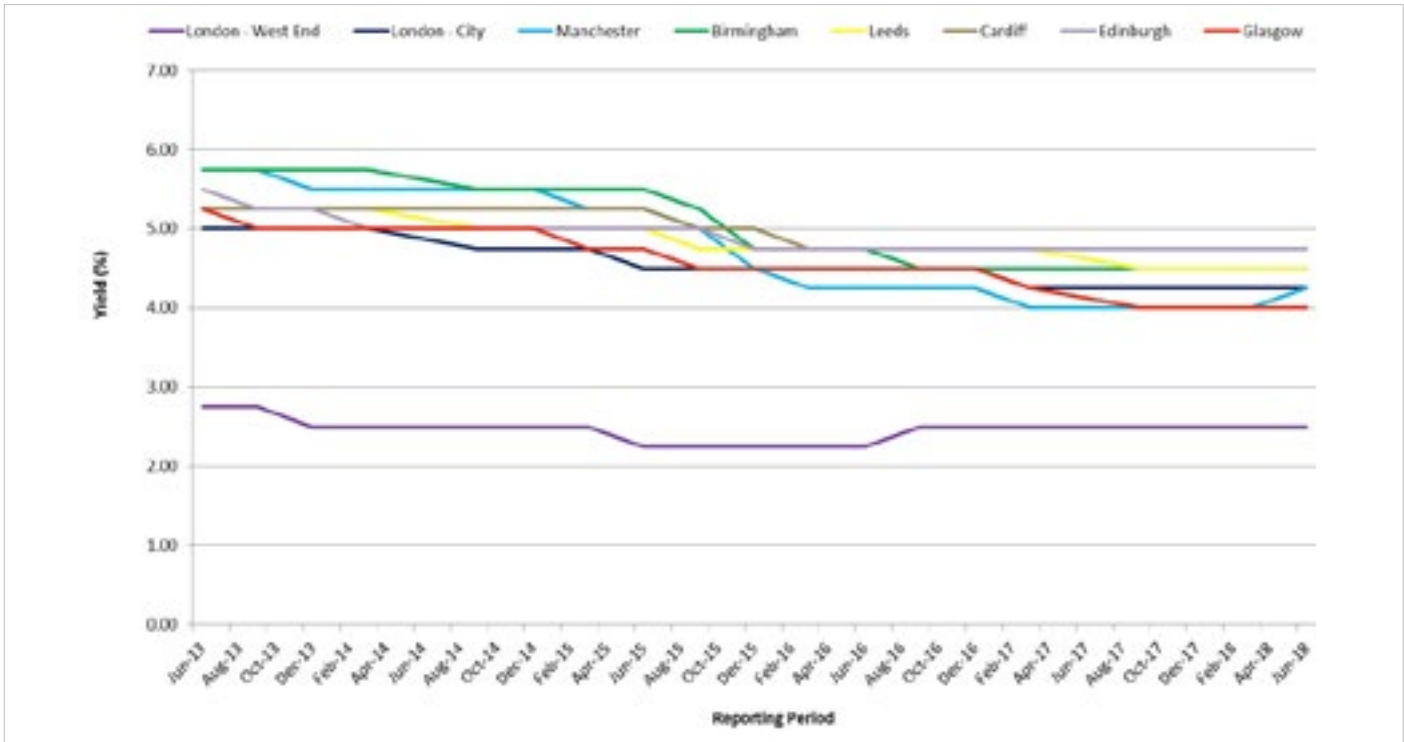
Table 5e: Prime Retails Rents



²³ Ibid

Table 5f²⁴ shows the indicative prime retail yields over the relevant reporting periods for Glasgow and various other UK comparator locations. Please note that zoning practices can differ between cities.

Table 5f: Prime Retail Yields



²⁴ Ibid

6. ENVIRONMENTAL INDICATORS AND CRIME/ASB

6.1 Street Cleanliness

Clean Glasgow, launched by Glasgow City Council in February 2007, commissioned independent street cleanliness surveys of the city centre which have been undertaken by the national environment agency, Keep Scotland Beautiful (KSB). Whilst the annual city centre survey was not repeated in November 2013, the City Centre Regeneration team commissioned a renewal of this report for November 2014 with a view to maintaining this process going forward.

The area surveyed consists of approximately 168 street sites (transects) and the survey reflects the standard of cleanliness of these areas, achieved at the time of the survey and assessed in accordance with the Environmental Protection Act 1990 and its attendant Code of Practice on Litter and Refuse (Scotland) 2006. Criteria assessed include the general standard of cleanliness, sources of litter, types of litter, and adverse environmental quality indicators (AEQIs). Each transect is graded (from A to D) with each grade worth a requisite number of points. The overall city centre Cleanliness Index (CI) is then a reflection of the total points scored as a percentage of the total possible points available. The KSB report will be repeated annually.

The CI score for April 2017 was 60, with 83% of all transects surveyed found to be of an acceptable standard (i.e. Grade A, B or B+). The overall CI scores for the **city centre** surveys undertaken to date are as follow:

Period	Sep 2007	Nov 2008	Nov 2009	Nov 2010	Nov 2011	Nov 2012	Nov 2014	Nov 2015	Apr 2017	Jun 2018
CI Score	66	66	64	66	66	62	64	60	60	59

As part of the independent surveys they conduct, KSB also report on various aspects of street cleanliness including Adverse Environmental Quality Indicators (AEQIs) i.e. common issues affecting the local environment within communities. The number of incidences of these issues recorded in each KSB report has been collated in **Table 6a** below.

Table 6a

	Sep-07	Nov-08	Nov-09	Nov-10	Nov-11	Nov-12	Nov-14	Nov-15	Apr -17
Dog fouling	2	2	1	1	1	4	1	2	2
Graffiti	12	10	13	16	17	15	4	27	52
Vandalism	1	1	0	1	0	0	0	1	2
Weeds	11	0	9	5	5	2	4	5	21
Detritus	8	11	12	10	12	9	7	7	34
Gum	28	31	66	57	16	46	32	87	79
Fly-posting	2	4	5	7	2	4	1	29	54
Fly-tipping	1	1	2	1	1	1	1	2	5

Established in 2016, the GCC-led Environmental Task Force is focused upon optimising environmental services across the Council Family and partner organisations, and delivering them at local level. Real time information from the public is gathered at the command centre in Bridgeton with 30 rapid response teams available to tackle the issues as quickly as possible. This includes dealing with environmental issues such as Fly-Tipping, Litter, Needle Uplifting, Dog Fouling, Fly-Posting, Graffiti and Environmental Enhancement.

The Local Environmental Audit and Management Systems (LEAMS) monitoring standard is used as an indicator for street cleanliness, audited by Keep Scotland Beautiful.

The KSB annual survey results for Glasgow **city-wide** cleanliness are shown in **Table 6b** as below.

Table 6b

Year	April	June	August (other LA)	October	December	KSB Validation	February (other LA)	Score
2010/2011	70	70	67	71	74	68	72	69
2011/2012	70	71	75	72	73	68	76	70
2012/2013	72	72	76	71	78	58	72	72
2013/2014	74	69	73	81	73	63	83	74

Please note that the methodology involved in the surveys for the year 2014/15 has changed. As a result of this the format of the scoring achieved has also changed to the following.

Year	Assessment 1 (Glasgow City CI)	Assessment 2 (Glasgow City CI)	Assessment 3 (KSB Validation)	Overall Score
2014/2015	82	85	76	81
2015/2016	69	82	80	77
2016/2017	63	79	76	77
2017/2018	79	72	57	69

6.2 Key Performance Indicators (KPIs)

Community Safety Glasgow monitors various quarterly performance indicators relating to crime and antisocial behaviour²⁵. Below is a sample of these indicators relevant to the city centre from January 2016 to June 2018. From April 2012 the data was collected by local authority ward rather than a larger area that had previously incorporated Partick West and Hillhead.

Ward 10 (Anderston/ City)	Jan-Mar 2016	Apr-Jun 2016	Jul-Sep 2016	Oct- Dec 2016	Jan-Mar 2017	Apr-Jun 2017*	Jul-Sep 2017	Oct- Dec 2017	Jan-Mar 2018	Apr-Jun 2018
Square meterage of graffiti removed	3201	2484	2702	2702	1994	737	1877	2736	2861	3131
Square meterage of flyposting removed	2	14	4	9	511	0	52	7	20	0
Fixed penalty notices issued (includes fly- tipping, dog fouling, litter, cigarette litter and chewing gum)	2672	2167	2295	1724	1992	1577	1854	1208	1358	1192
Number of school, community and business clean-ups undertaken	78	81	98	98	96	57	91	105	107	122
Number of volunteers actively engaged with CSG through NIES ²³	196	232	426	314	210	378	378	561	459	602

* It should be noted that data from April 2017 is now being provided for the Anderston City/Yorkhill Ward. Prior to this, data refers to the old Anderston City Ward.

²⁵ CSG, August 2018.

²⁶ Neighbourhood improvement and Enforcement Service.

6.3 Crime and antisocial behaviour

Table 6c provides data on crime, incidents and antisocial behaviour (ASB) for the period of January-June 2018. The figures from the same period in 2017 are also provided for comparison.

The data collated covers the Local Community Planning Partnership Central and West area, which is an aggregation of the Council wards of Partick West, Hillhead and Anderston/City. This is the largest local CPP in the City by population size.

DEFINITIONS

- ASB Incidents - Police Scotland incidents relating to complaints, disturbances, neighbour and noise complaints.
- Youth Disorder - the same as above but filtered to isolate youth related incidents by disposal code/qualifier and free text search for phrases indicating youth involvement.
- ASB Crime - data from the Police Scotland Corporate Database covering a variety of ASB type offences relating to disregard for community wellbeing (such as BOP, threatening or abusive behaviour, drunk and incapable behaviour etc.), environmental damage (such as littering, vandalism etc.), misuse of public space (such as street drinking, prostitution, and all Fixed Penalty Notices).
- Violent Crime - all Group 1 crime of violence and simple/common assaults taken from the Police Scotland Corporate Database.

Table 6c: Crime/ASB indicators - Central & West neighbourhood

KPI Type	January – June 2017	January – June 2018	+/-	% change
ASB Incidents	3434	3041	- 393	- 11%
Youth Disorder	265	189	- 76	- 29%
ASB Crime	2330	1499	- 831	- 36%
Violent Crime	996	927	- 69	- 7%

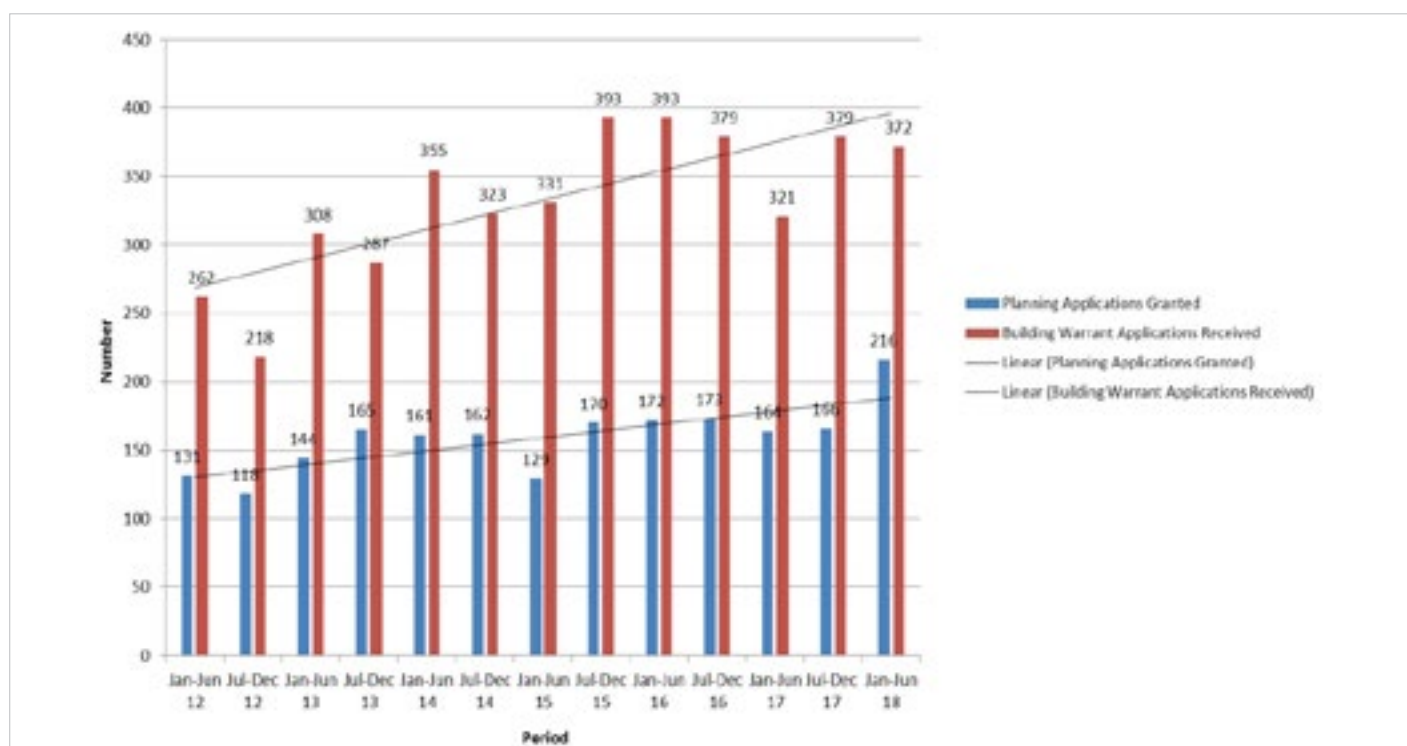
7. PLANNING AND DEVELOPMENT

7.1 Planning Applications and Building Warrant Applications

Table 7a²⁷ provides a comparison of both planning applications granted and building warrant applications received within Ward 10 (Anderston/City centre) against the periods January to June and July to December for years 2012 to 2018.

The number of planning applications granted for period January to June 2018 (against the same period in 2017) showed an increase of 31.71%. The number of building warrant applications received also showed an increase of 15.89%.

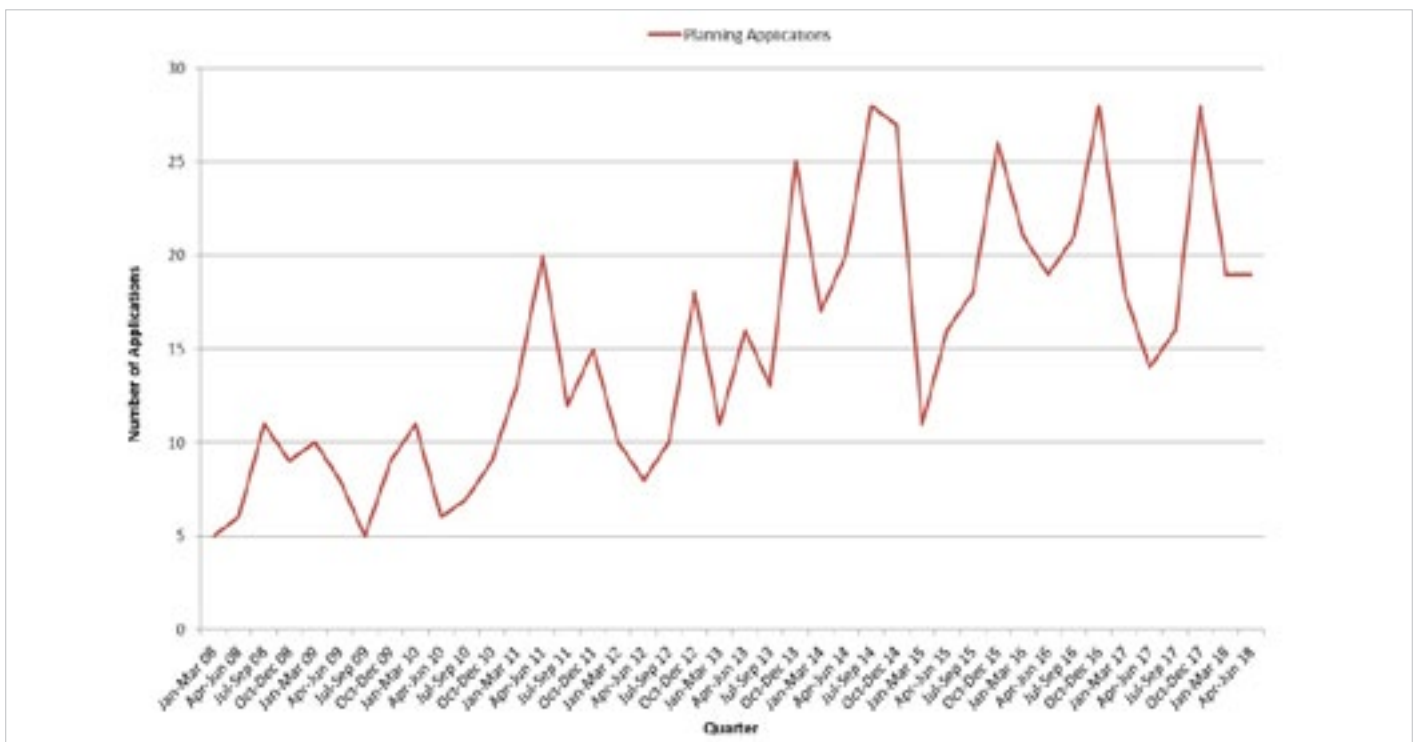
Table 7a: Ward 10 Anderson/ City



7.2 City Centre Retail Planning Applications

Table 7b²⁸ tracks the quarterly numbers of retail planning applications approved since January 2008 to June 2018 using monthly data collated by GCC. The figures collected from January to June 2018 represent an increase of 18.75% on the figures recorded from January to June 2017.

Table 7b: City Centre: Retail Planning Applications 2008 - 2018



8. TOURISM

8.1 Glasgow Hotel Occupancy Rates

Since April 2017, STR Global Ltd. has taken over from Lynn Jones Forecaster in providing hotel occupancy rates for the city. It should be noted that STR's new figures represent a larger suite of hotels so a direct comparison against previous years cannot be made. For this edition, hotel occupancy rates for period July 2017 - June 2018³⁵. Table 8a illustrates the hotel occupancy rates, average daily rate and revenue per available room for this reporting period. The average hotel occupancy rate recorded from January -June 2018 was 79.2%.

Table 8a

Hotel Occupancy 2017	Jul	Aug	Sep	Oct	Nov	Dec
Occupancy	87.3%	93.6%	90.4%	85.8%	86.7%	69.8%
ADR (Average Daily Rate)	£75.05	£80.51	£78.74	£73.83	£75.90	£67.06
RevPar (Revenue Per Available Room)	£65.55	£75.33	£71.16	£63.39	£65.78	£46.80

Hotel Occupancy 2018	Jul	Aug	Sep	Oct	Nov	Dec
Occupancy	63.1%	76.6%	79.0%	79.3%	86.9%	90.5%
ADR (Average Daily Rate)	£58.95	£64.90	£72.13	£66.09	£84.07	£86.87
RevPar (Revenue Per Available Room)	£37.21	£49.70	£56.95	£52.38	£73.05	£78.60

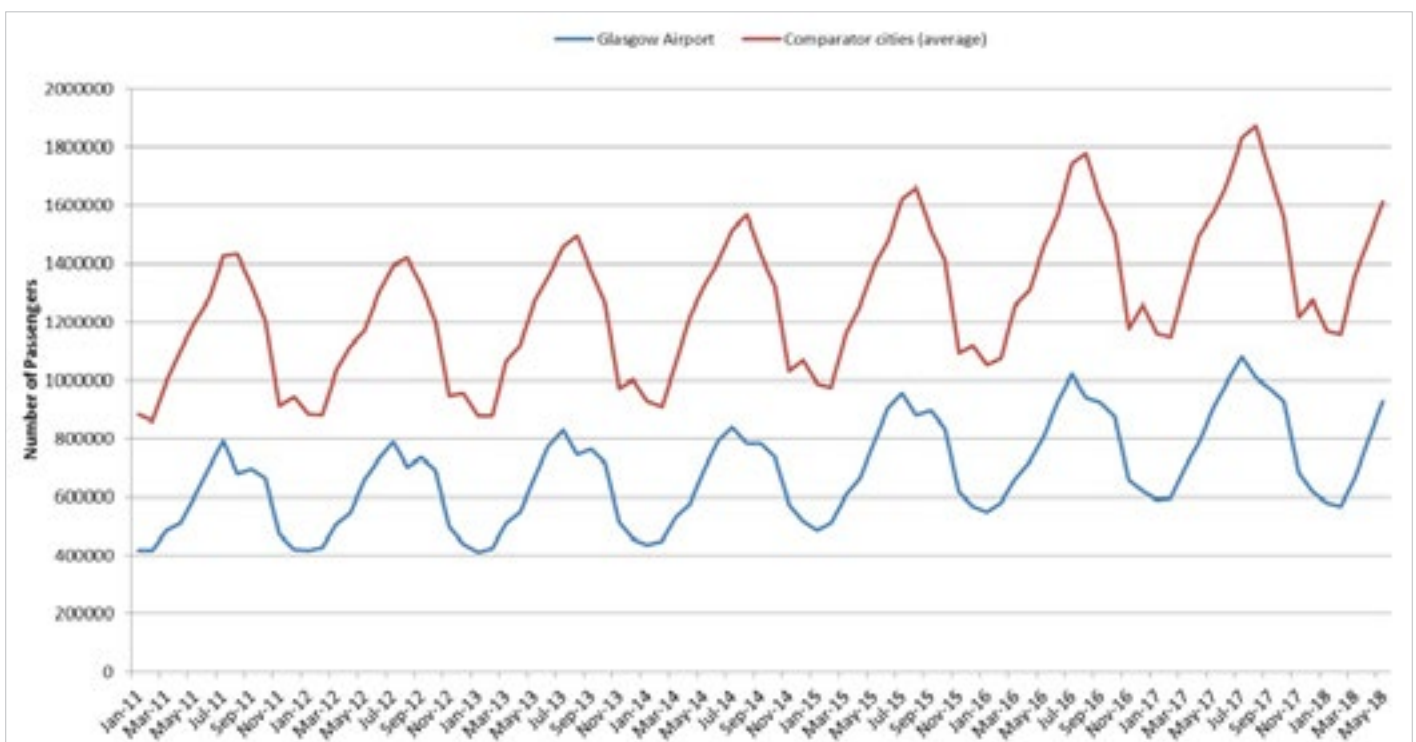
8.2 Glasgow International airport: Passenger Numbers

Glasgow International Airport operates 365 days a year, 24 hours a day and deals with approximately 9 million passengers a year, generating almost £200 million annually to the economy²⁹. Further snapshot facts and figures on the airport can be accessed via the following link: <http://www.glasgowairport.com/about-us/facts-and-figures>

Table 8b³¹ illustrates Glasgow Airport's total passenger numbers and how they compare to an average taken of other cities. The figures cover the period January 2011 – May 2018 and relate to the number of terminal passengers recorded by the Civil Aviation Authority. Glasgow Airport and its comparators tend to demonstrate the same yearly trends. Please note that for this edition June 2018 figures cannot be used due to a change in airports used for comparison.

Comparing the first half of 2018 against the same period in 2017, Glasgow Airport demonstrated a 1.21% decrease in average monthly passenger numbers. On average, comparator cities which showed an overall increase of 1.08%.

Table 8b: Glasgow Airport Terminal Passenger Numbers



²⁹ Glasgow Airport website accessed, August 2018

³⁰ CAA website accessed, February 2018

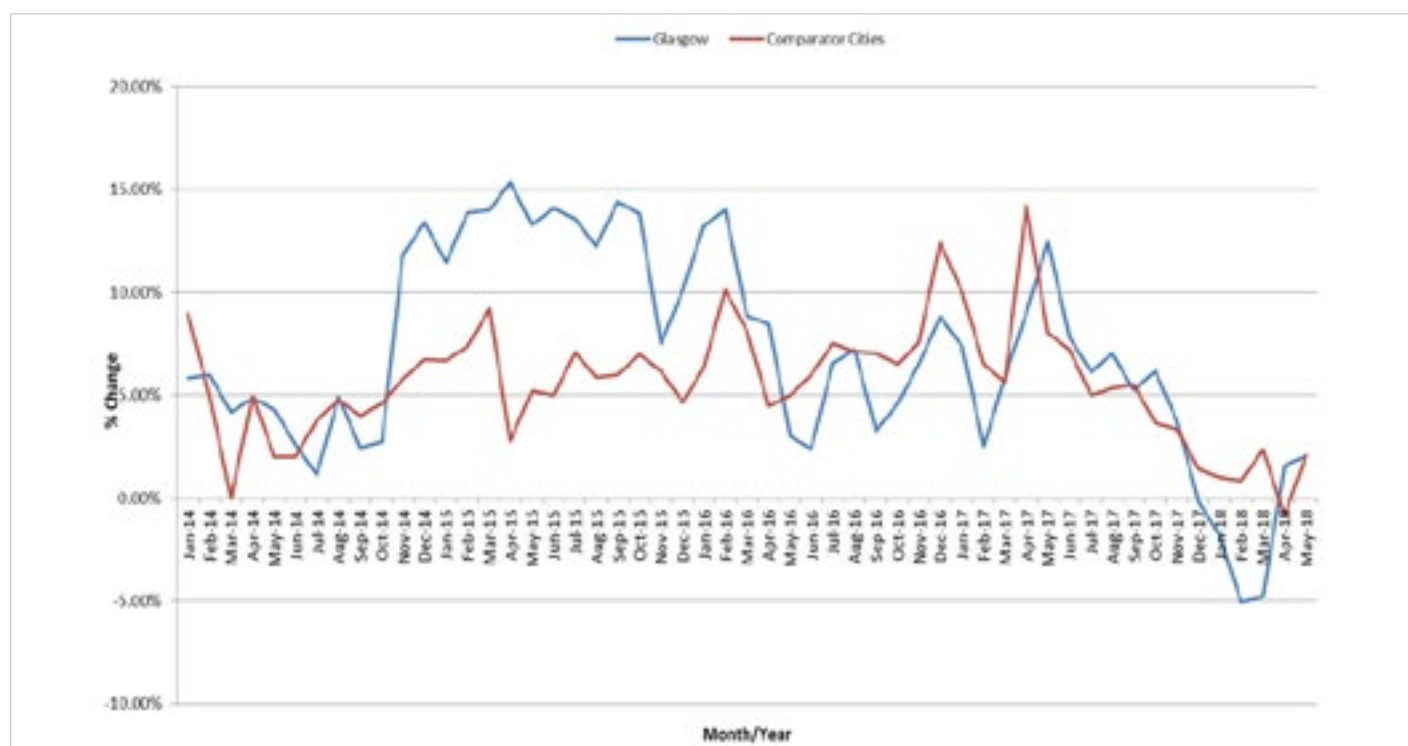
³¹ Birmingham, Bristol, Cardiff, Edinburgh, Gatwick, Heathrow, Leeds, Liverpool, London City, London Luton, Manchester, Newcastle, Norwich and Stanstead

8. TOURISM

8.2 Glasgow International airport: Passenger Numbers

Table 8e³² shows the year-on-year percentage rate change in airport passenger numbers recorded at Glasgow Airport for each month. For comparison purposes, a similar calculation is made for the year-on-year percentage rate change in the average airport passenger numbers of the comparator cities. The graph shows that Glasgow performed only slightly better for the previous period January –May 2017 (0.07% compared to -1.61%).

Table 8c: Annual Change in Airport Passenger Numbers



9. CITY CENTRE EXPERIENCE

9.1 City Centre Mural Trail

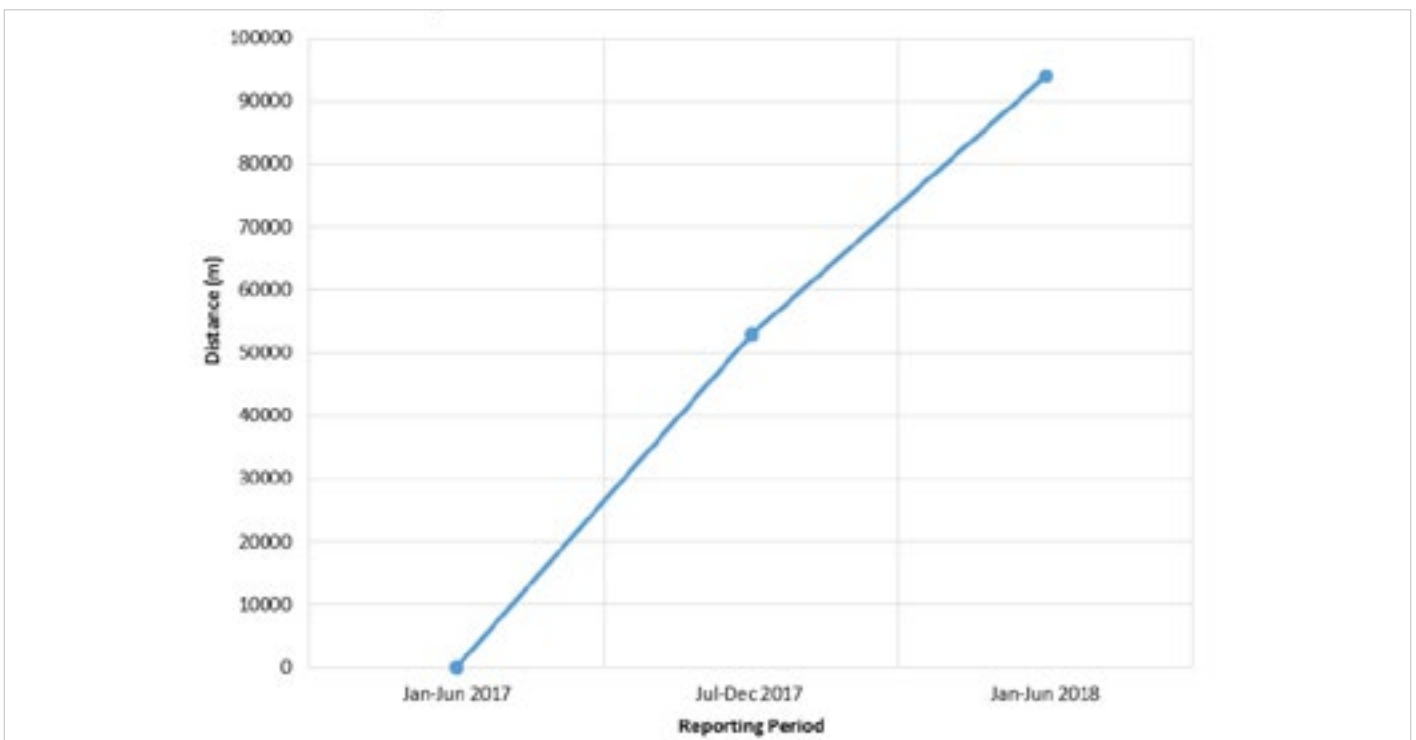
In 2014, the city centre mural trail was officially launched to promote the growing portfolio of works adorning buildings within Glasgow city centre. The murals showcase a diverse range of talent and styles and are now recognised as unique pieces of art in their own right. They have generated hugely positive public and business feedback while creating striking features that enhance the city centre environment.

Table 9a shows the number of city centre murals

Year	Total no. of city centre murals
2018	24

The mural trail app was launched in August 2017 and allows you to easily follow the trail using the online map. In addition, users can also experience the health benefits by measuring the distance walked while completing the mural trail as shown in **Table 9b**.

Figure 9b: Distance Walked (m)



9.2 AUTISM FRIENDLY GLASGOW CITY CENTRE

In April 2018, Glasgow launches its Autism Friendly city centre project and will see a variety of businesses and services, across the city, make their venue more autism aware.

An autism friendly city centre provides an opportunity for both council services and the business community to promote the city centre as an inclusive, family friendly location whilst helping create a city where there is fairness, diversity and equality for all.

A wide range of organisations including shopping centres, transport hubs and museums etc. will introduce quiet rooms, quiet hours, pre visit information, sensory bags and train staff in a bid to become autism friendly.

Further information on this project can be found here: <https://www.glasgowcitycentrestrategy.com/project/autism-friendly-city-centre>

Year	Number of Autism venues
2018	19

9.3 CHILD SAFE

The city centre's Child Safe Zone initiative uses a variety of measures to reunite lost children with their families, with posters displayed around the city centre showing a helpline number which connects directly to the Glasgow Community Services Operations Centre. In the event that a child becomes separated from their parent/guardian, the security team will immediately implement their search procedures.

In addition, visitors can write their mobile phone number onto a free, colourful wristband which is then secured around their child's wrist, so that anyone finding a lost child can quickly contact them to let them know that their child is safe. The wristbands are available at key locations in the city centre.

A full list of these locations can be found at <http://www.glasgow.gov.uk/childsafezone>

Figure 9b: Distance Walked (m)

Year	Number of Chid Safe venues
2018	12

10. GLASGOW NEWS ROUND-UP

Web links

Whisky firm “comes home” to base global HQ in Glasgow city centre, May 02 2018

http://www.eveningtimes.co.uk/news/16200007.Whisky_firm___comes_home___to_base_global_HQ_in_Glasgow_city_centre/

New £1.4m gymnastics excellence centre to be built in Glasgow, May 02 2018

<https://www.scotsman.com/news/new-1-4m-gymnastics-excellence-centre-to-be-built-in-glasgow-1-4733931>

Glasgow takes centre stage as Benedict Cumberbatch-fronted Patrick Melrose launches on Sky Atlantic, May 03 2018

<https://www.thescottishsun.co.uk/news/2585410/benedict-cumberbatch-patrick-melrose-glasgow-sky-atlantic/>

Glasgow Mela – global bhangra superstar to headline at Kelvingrove Park festival, May 03 2018

<https://www.glasgowlive.co.uk/whats-on/glasgow-mela-announces-global-bhangra-14604894>

Glasgow residents encouraged to close streets for outdoor events this summer, May 05 2018

<https://www.glasgowlive.co.uk/news/glasgow-news/glasgow-residents-encouraged-close-streets-14618680>

Bookbug Week kicks off today with hundreds of free events for Glasgow kids, May 14 2018

<https://www.glasgowlive.co.uk/whats-on/family-kids-news/bookbug-week-kicks-today-hundreds-14654395>

Stunning images from Yardworks graffiti festival in Glasgow, May 13 2018

<https://www.glasgowlive.co.uk/whats-on/arts-culture-news/stunning-images-yardworks-graffiti-festival-14652879>

Glasgow shopping centre installs new signage for “invisible” disabilities, May 22 2018

<https://www.glasgowlive.co.uk/news/glasgow-news/glasgow-shopping-centre-installs-new-14691662>

Riverside Festival 2018: Can you spot yourself in our gallery?

http://www.eveningtimes.co.uk/news/16253541.Riverside_Festival_2018__Can_you_spot_yourself_in_our_gallery_/

Massive two-day Italian festival set for Glasgow – all you need to know, May 31 2018

http://www.eveningtimes.co.uk/news/16257915.Two-day_Italian_festival_set_for_Glasgow/

Glasgow Science Festival takes off with an action-packed calendar, June 6 2018

<https://www.glasgowlive.co.uk/whats-on/glasgow-science-festival-takes-action-14748877>

Glasgow celebrates busiest May on record for business tourism, June 11 2018

<http://www.meetpie.com/modules/newmodule/newsdetails.aspx?t=Glasgow-celebrates-busiest-May-on-record-for-business-tourism&newsid=28252>

West End Beer Festival returns to Glasgow for fourth year, June 17 2018

<https://www.glasgowlive.co.uk/whats-on/return-west-end-beer-festival-14793837>

Three week family festival to put community talent centre stage at Glasgow's Kelvingrove Bandstand, June 15 2018

<https://www.sundaypost.com/fp/three-week-family-festival-to-put-community-talent-centre-stage-at-glasgows-kelvingrove-bandstand/>

Glasgow becomes first Scottish city to introduce UK's fastest Wi-Fi, June 19 2018

http://www.thenational.scot/news/16300839.Glasgow_becomes_first_Scottish_city_to_introduce_UK__39_s_fastest_wifi/

One of Glasgow's hidden lanes to re-open as pop up food, drink and event space, July 06 2018

<https://www.glasgowlive.co.uk/whats-on/music-nightlife-news/one-glasgows-hidden-lanes-re-14876720>

Glasgow and Edinburgh tied as third most attractive UK city for investment, July 09 2018

<https://www.scotsman.com/business/markets-economy/glasgow-and-edinburgh-tied-as-third-most-attractive-uk-city-for-investment-1-4765928>

World Street Dance Championships return to Glasgow, July 19 2018

<https://www.glasgowlive.co.uk/whats-on/music-nightlife-news/world-street-dance-championships-return-14930468>

World Pipe Championships coming to Glasgow – all you need to know, July 23 2018

<http://www.eveningtimes.co.uk/news/16370821.world-pipe-championships-coming-to-glasgow-all-you-need-to-know/>

All eyes on Glasgow as BBC make pop up studio for George Square for European Championships, July 29 2018

<https://www.dailyrecord.co.uk/news/scottish-news/eyes-glasgow-bbc-make-pop-12996782>

Record year for international visitors to Glasgow sees visitor numbers rise to 19%, July 31 2018

<https://sbnn.co.uk/2018/07/31/record-year-for-international-visitors-to-glasgow-sees-visitor-numbers-rise-by-19/>

New Glasgow Airport cycle route officially opens today, August 6 2018

<https://www.glasgowlive.co.uk/news/glasgow-news/route-officially-opens-today-14996824>

Opening weekend of Glasgow 2018 “outstanding success”, August 6 2018

<https://www.glasgowlive.co.uk/news/glasgow-news/opening-weekend-glasgow-2018-outstanding-14997334>

Glasgow says goodbye to European Championships with City Centre party, August 13 2018

<http://www.eveningtimes.co.uk/news/16414554.glasgow-says-goodbye-to-european-championships-with-city-centre-party/>

£140k investment sees Glasgow become 14th airport in the UK to install changing places, August 17 2018

<https://www.accessandmobilityprofessional.com/140k-investment-sees-glasgow-become-14th-airport-in-uk-to-install-changing-places/>

World Pipe Championships get underway in Glasgow, August 17 2018

<https://www.bbc.co.uk/news/uk-scotland-45205542>

Glasgow Harbour £100m waterfront development to be open and trading by 2021, August 16 2018

<https://www.insider.co.uk/news/glasgow-harbour-savills-peel-outdoor-13090073>

New Glasgow street mural nearing completion, August 20 2018

<https://www.glasgowlive.co.uk/news/glasgow-news/new-glasgow-street-mural-nearing-15050835>

Urban sports celebrated at youth games in Glasgow, August 26 2018

<https://www.bbc.co.uk/news/uk-scotland-glasgow-west-45313349>

11. MAILING LIST AND SURVEY

To subscribe to the Health Check please send an email to the address below with your contact details. You can also access the latest and archived issues at www.glasgow.gov.uk/index.aspx?articleid=2977 .

For any further information please contact:

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